



ESCLive

ESC Livelink User Training Guide

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Developed in cooperation with the
Materiel Systems Group MM Directorate
(MSG/MM)

TABLE OF CONTENTS

COURSE OVERVIEW	VI
ADMINISTRATION	1
WHAT IS ESCLIVE?	2
WHAT ARE THE BENEFITS OF LIVELINK?	2
WHY WAS LIVELINK SELECTED BY ESC?.....	3
WHY IS ESC USING LIVELINK?	4
EXERCISE 2: OPENING ESCLIVE VIA EXPLORER PRO AND NAVIGATION MENUS	6
VIEWS	6
OPEN LIVELINK EXPLORER	7
EXPLORER BUTTONS.....	9
WINDOWS EXPLORER SEARCH.....	9
HANSKOM LIVELINK AND WORKSPACES	10
<i>Personal Workspace</i>	11
<i>Project Workspace</i>	12
<i>Enterprise Workspace</i>	13
MAKING A FAVORITE.....	14
ACCESSING FAVORITES.....	15
REFRESH	16
HELP (<i>NOT A CLASS EXERCISE</i>)	17
EXERCISE 3: ADD FOLDER.....	18
PERMISSIONS	20
<i>View Permissions</i>	21
<i>Permission Definitions</i>	22
EXERCISE 4: DOCUMENT FUNCTIONS.....	24
MICROSOFT WORD, EXCEL AND POWERPOINT DOCUMENTS	24
<i>Create a Document</i>	24
<i>Check Out</i>	28
<i>Check In</i>	29
DOCUMENTS OTHER THAN WORD, EXCEL OR POWERPOINT (<i>NOT A CLASS EXERCISE</i>) ..	31
<i>Creating a Document</i>	31
<i>Editing a Document</i>	32
INFORMATION ABOUT ESCLIVE OBJECTS	33
<i>Metadata</i>	33
<i>Versions (View, Purge and Delete)</i>	34
<i>Audit</i>	35
COPYING DOCUMENTS VIA THE DRAG AND DROP METHOD	36

EXERCISE 5: MAKING AN ALIAS	40
PERMISSIONS FOR AN ALIAS	42
EXERCISE 6: ADDING A URL	43
EXERCISE 7: LINKS TO ESCLIVE OBJECTS.....	45
EXERCISE 8: SEARCH (<i>NOT A CLASS EXERCISE</i>)	48
SIMPLE SEARCH:	48
NESTED SEARCH	50
EXERCISE 9: NOTIFICATIONS	52
CHECK YOUR SETTINGS.....	53
MODIFY YOUR GENERAL INTERESTS	54
MODIFY SPECIFIC INTERESTS.....	57
<i>Setting Notification for Training Manual Updates</i>	57
EXERCISE 10: COURSE EVALUATION AND CLASS CLEAN UP.....	59
COURSE EVALUATION.....	59
DELETE CREATED OBJECTS	59
REMOVE FAVORITES	60
SHUT DOWN.....	61
APPENDIX A: GETTING HELP.....	62
REFERENCE INFORMATION FOR ESCLive (LIVELINK):	62
<i>ESCLive Training Area:</i>	62
<i>Livelihood Help:</i>	62
<i>Reference Information for the Livelihood application:</i>	62
<i>Contacts:</i>	62
APPENDIX B: INSTRUCTIONS FOR SETTING UP THE LIVELINK EXPLORER PROFESSIONAL CLIENT	63
APPENDIX C: ACCESSING ESCLIVE VIA THE WEB VIEW	64
SIGN IN TO ESCLIVE	64
1. <i>Hanscom.af.mil account holders from work</i>	64
2. <i>Hanscom.af.mil account holders via ESCenternet</i>	64
3. <i>Hanscom.af.mil account holders away from work</i>	65
4. <i>Non-Hanscom.af.mil account holders</i>	66
APPENDIX D: WEB VIEW REFERENCE GUIDE....	67

APPENDIX E: WEB BROWSER SETTINGS..... 70

CONFIGURING CACHE SETTINGS	70
<i>Setting Cache Options with Microsoft Internet Explorer 5.x:</i>	70
<i>Setting Cache Options with Netscape Navigator/Communicator 4.x:</i>	70
CONFIGURING COOKIE AND JAVA SETTINGS.....	70
<i>Setting Cookie and Java Options with Microsoft Internet Explorer 5.x:</i>	71
<i>Setting Cookie and Java Options with Netscape Navigator/Communicator 4.x:</i>	71
CONFIGURING YOUR PC SYSTEM TO HANDLE FILE TRANSFERS.....	71
<i>Configuring file handling options using Microsoft Explorer for Windows 95, 98, or NT 4.0:</i>	71
<i>Configuring file handling options using Netscape Navigator/Communicator 4.x:</i> ..	72
BACKGROUND INFORMATION ABOUT MIME TYPES	73
CONFIGURING YOUR BROWSER FOR THE PROXY SERVER	73
<i>Configuring Internet Explorer 5:</i>	73
<i>Configuring Netscape Communicator/Navigator:</i>	74

APPENDIX F: ESCLIVE (LIVELINK) ICONS 75

COURSE OVERVIEW

Objectives

- Understand basic document management functions of ESCLive using the Livelink Explorer Professional interface.
- Become “comfortable enough” with ESCLive to start using it in your own organization.

How to Proceed

- Before starting each exercise, please read any **Exercise Overview** and/or **Purpose** statements.
- Be sure to read each step carefully and complete each step as directed. **Don’t skip any steps.**
- Read all **Notes, Reminders, Cautions, Warnings** and **Best Practices**.
- Resource and additional information is listed at the back of the guide.

Sandbox

The ESCLive “**Sandbox**” is a “no risk” area that can be used to practice Livelink functions. This guide may be used in the Sandbox as well as during the formal training class.

Contact your ESCLive KM Team to obtain a Sandbox account.

ADMINISTRATION



This ESCLive User Training class is scheduled to take **two hours** and **assumes the user has a basic understanding of Windows Explorer.**

The intent of this training manual is to highlight some of the main features of ESCLive, to instill a basic working knowledge of document management in ESCLive, and to get you started using ESCLive using the Livelink Explorer Professional client interface.

This manual does not try to present every feature of, or every way of accomplishing a task in ESCLive or Livelink Explorer Pro. The scope of the training, the manual, and the time allotted does not permit full explanation of all features.

This manual, including the Appendices, also acts as a ready reference. In addition, detailed information on ESCLive is available from on-line Livelink help and from sources referenced in Appendix A.

All ESCLive training materials are available on the ESCLive Enterprise home page.

*** WARNING **	
	
<p>All information stored on ESCLive should be FOUO (For Official Use Only). Classified information of any level should NOT be stored on ESCLive. It is your responsibility to properly publish information.</p>	

*** NOTE ***
<p>The ESC Philosophy for the sharing of knowledge (within the secure ESCLive user community) is one of openness. That is, we should share our knowledge openly whenever possible, but control its ability to be updated. Obviously, circumstances such as certain financial data or Foreign Military Sales, or contractor sensitive documents would be restricted to only those users needing the information.</p>

EXERCISE 1: ESCLIVE OVERVIEW

Exercise Overview: Understand what Livelink is, what are the benefits, and why is ESC using it.

What is ESCLive?

ESCLive (Livelink) is a **secure Web-based** commercial product in use by AFMC including ESC at Hanscom AFB. Livelink capabilities include:

- **Application capabilities**
 - Document Management (version control, check-in/check-out)
 - Process Automation (workflow)
 - Robust Search capability – (retrieve docs via multiple search methods)
 - Notification of events (email alerts if a document is updated)
 - Electronic Records Management (RM)
 - Discussion Forums
 - Task assignments
 - News Channels

What are the benefits of Livelink?

- **Livelink enables the ESC enterprise to move its business documents to the web to improve**
 - Access
 - Collaboration
 - Retrieval
- **Can find the document you're looking for**
 - Livelink indexes every word in every document and has powerful advanced search capabilities
- **No more asking, “has he/she seen the document yet?” Or “when did they see it?”**
 - You can easily determine the complete history of any document loaded into Livelink
- **No more asking “is the latest version?”**

- Livelink preserves the all the versions for any document, with the most recent displayed by default
- **Can access documents from anywhere, any time, with any browser and internet access**
 - No need to use RAS or VPN
 - Access anywhere anytime (24/7) via web browser
 - External partners gain secure access to business documents
- **Can “e-mail” documents of almost any size**
 - E-mail the Livelink URL vs. E-mailing the file
- **The owner of the document can share it with virtually anyone**
 - No need to grant other organizations access to your shared drives
- **Livelink can notify you any time a document’s status changes**
 - No more checking the file to see if it’s been updated, or calling/e-mailing to see if changes have been made
- **Processes can be automated and managed over the web**
 - Livelink’s “workflow” functionality can . . .
 - Run the process
 - Direct work packages to those who need to act upon them
 - Allow managers to track status
- The secure Hanscom Web-mail workspace (for hanscom-2k domain users) can be used in conjunction with Livelink

Why was Livelink selected by ESC?

- **Best of Breed application**
 - Document management
 - Workflow
 - Collaboration
 - Electronic Records Management (with RM module)
- **Enables 3 Principles of IDE**
 - Owner is keeper
 - Replace reporting with notification and access
 - Preserve critical information

- **Recommended by Air Force Communications Agency, Air Force Materiel Command, and Gartner Group**
- **Livelihood vendor has a strong market presence**
- **Livelihood used by 4500 worldwide organizations, including:**
 - AFRL Edwards AFB
 - ASC Tinker AFB
 - MSG Lackland AFB
 - ESC Warner-Robins ALC
 - LA AFB Eglin AFB (46 TW)
 - Andrews AFB Space and Missile Center (SMC)
- **Multiple sources for support, training and expansion modules**

Why is ESC using Livelihood?

- **Livelihood enables ESC to move its business documents to the web to improve:**
 - Access to documents
 - Collaboration on documents
 - Retrieval of documents

In an 8 May 03 memo, LtGen Looney stated:

“I want all ESC program offices, functional organizations, and the geographically separated units to have [Livelihood’s] capabilities and use them to share information across the ESC enterprise. Consequently, I am hereby directing all ESC organizations to implement the Livelihood application.”

“ . . . by 1 Oct 03, CPSG, MSG, and all ESC organizations at Hanscom will [place newly generated documents, and all existing documents they plan to continue using, into Livelihood](#). SSG and 38th EIG will begin the Livelihood implementation process by this same date.”

“ . . . all two-letter organizations should [develop plans](#) for achieving the above goal, and [appoint an Organizational Knowledge Manager \(OKM\)](#) for Livelihood implementation.”

- **ESC/CC objective:**
 - **We need to be able to locate and see each other's stuff**
 - **Use Livelink for its intended purposes – collaboration and enhanced document management**
 - Does NOT mean all documents on your shared drives
 - The ACTIVE documents on your “O”, “G” and “X” Drives are the primary candidates for Livelink
 - Active use includes:
 - Documents you frequently reference
 - Documents you are actively sharing in and across your organizations

***** Note *****

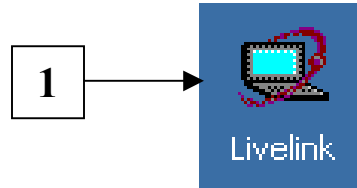
Livelink® is a product of Open Text Corporation. To date, ESC uses Livelink® as well as affinity partner and other vendor products that integrate with Livelink® as collaborative tools to support the ESCLive enterprise.

END EXERCISE 1

Open Livelink Explorer

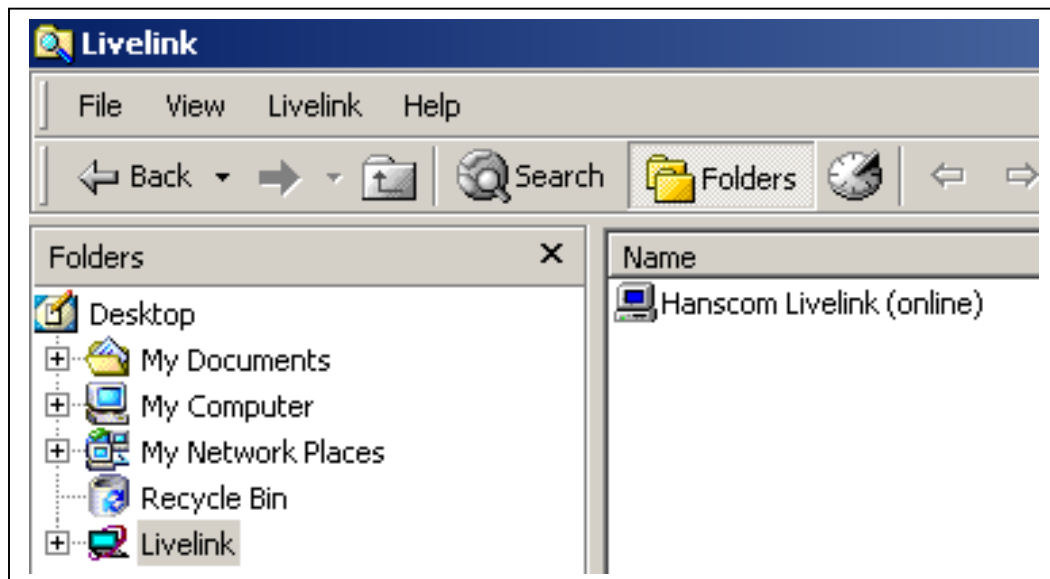
Overview: Although you have signed in with your network login, your training activity will occur in a training-only area.

1. Double-click on the Livelink icon on your desktop,

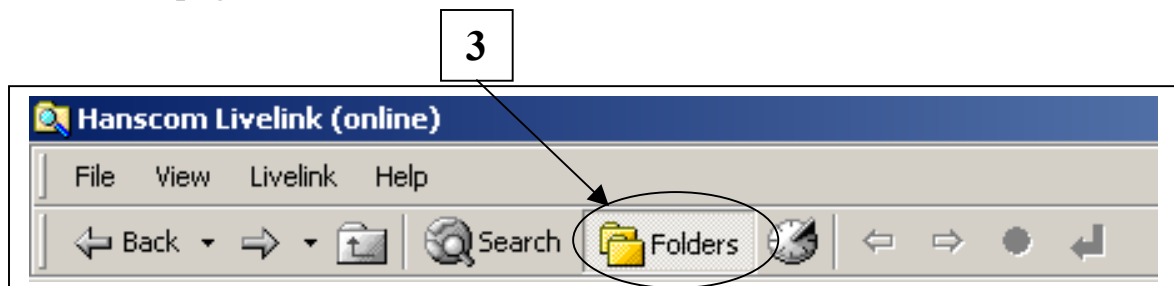


or use any other method of opening Windows Explorer.

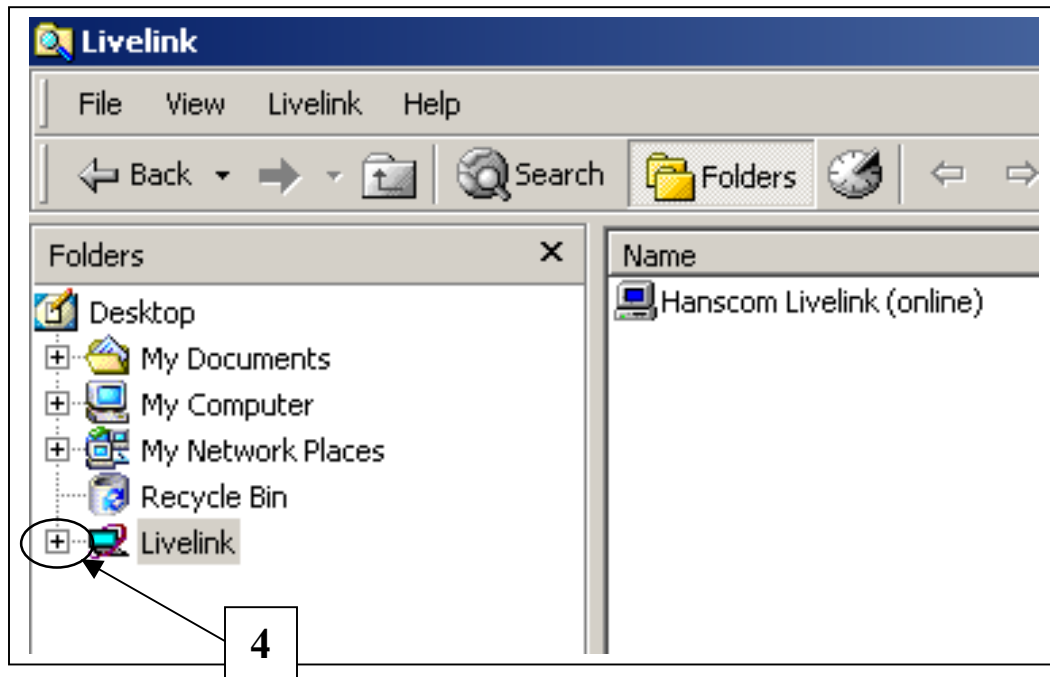
2. Windows Explorer, with Livelink included, will open.



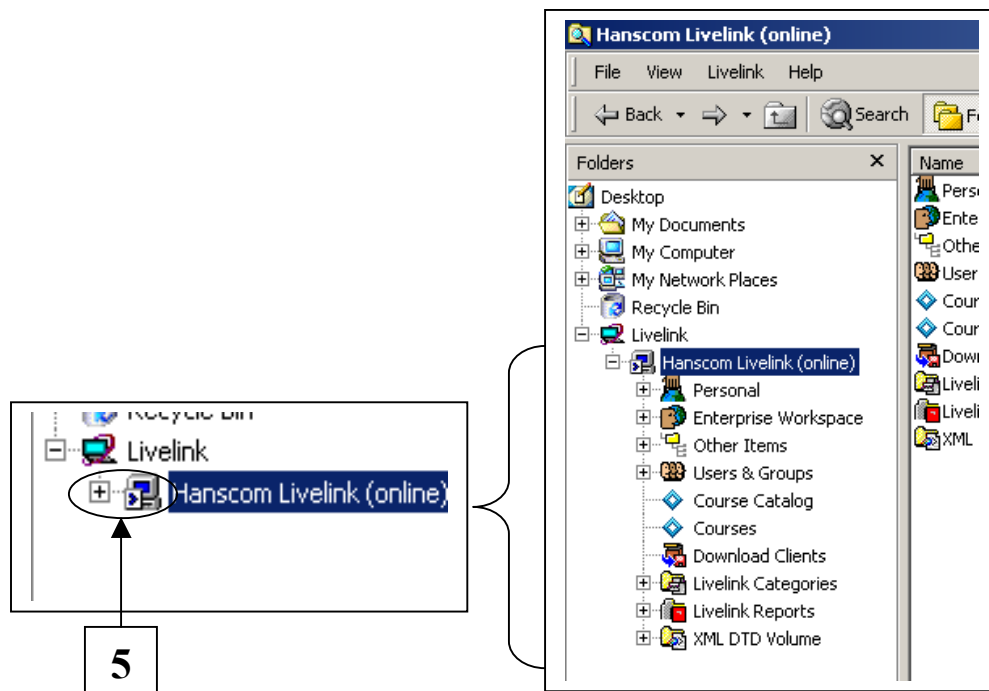
3. Depending on the method used to access Livelink Explorer, you may not have the normal two-pane Windows Explorer view. If you do not have the normal two-pane view, click on the **Folders** button at the top of the page.



4. Click the plus sign  next to **Livelink**. The plus sign expands (displays) the contents of a folder.

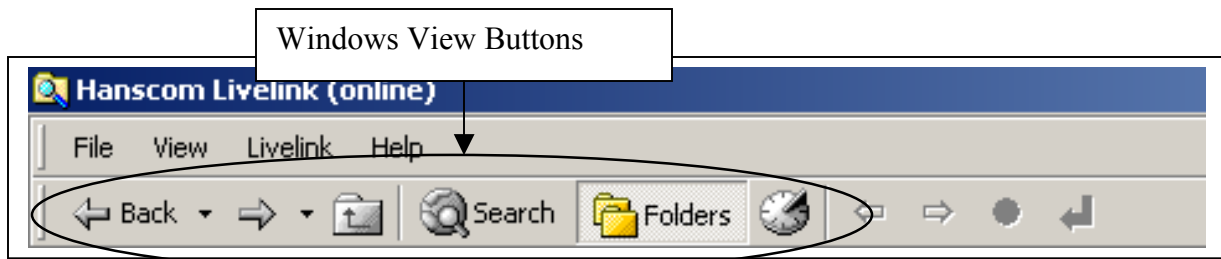


5. Expand Hanscom Livelink (online). The major areas of ESCLive are displayed. Note the folder is highlighted and includes a small arrow to indicate it is currently selected.

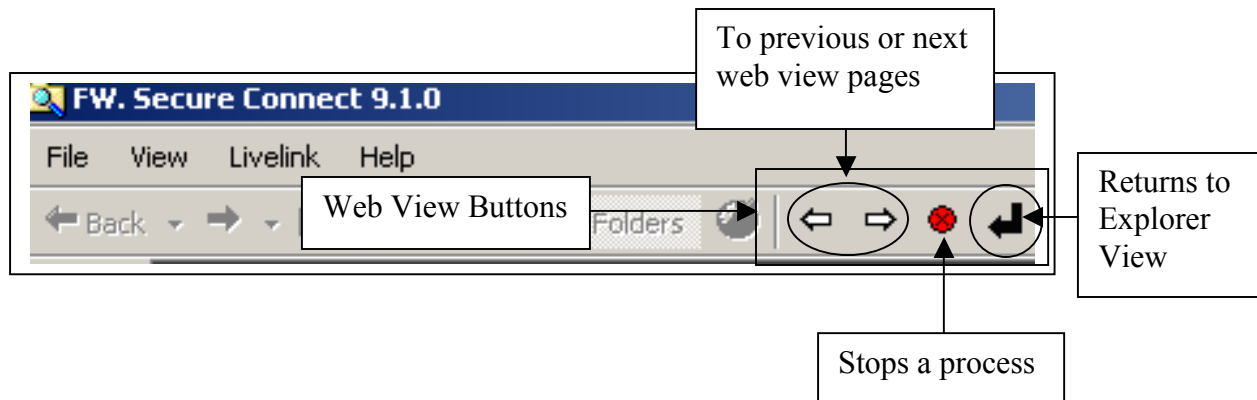


Explorer Buttons

In the Explorer view, the standard Windows Explorer buttons are **enabled**; the Browser or Web view buttons are disabled (grayed out).

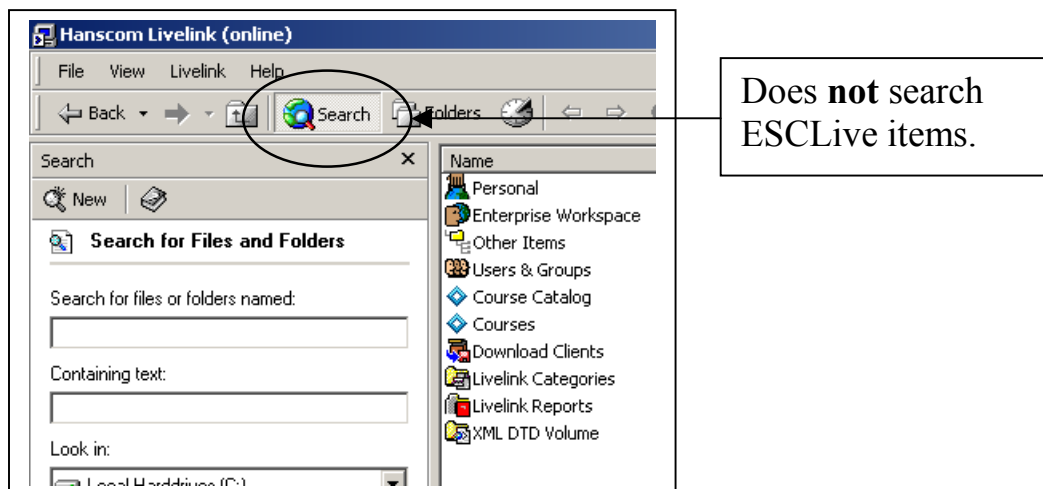


In the Browser or Web view, the Browser or Web view buttons are **enabled**; the standard Windows Explorer buttons are disabled (grayed out).

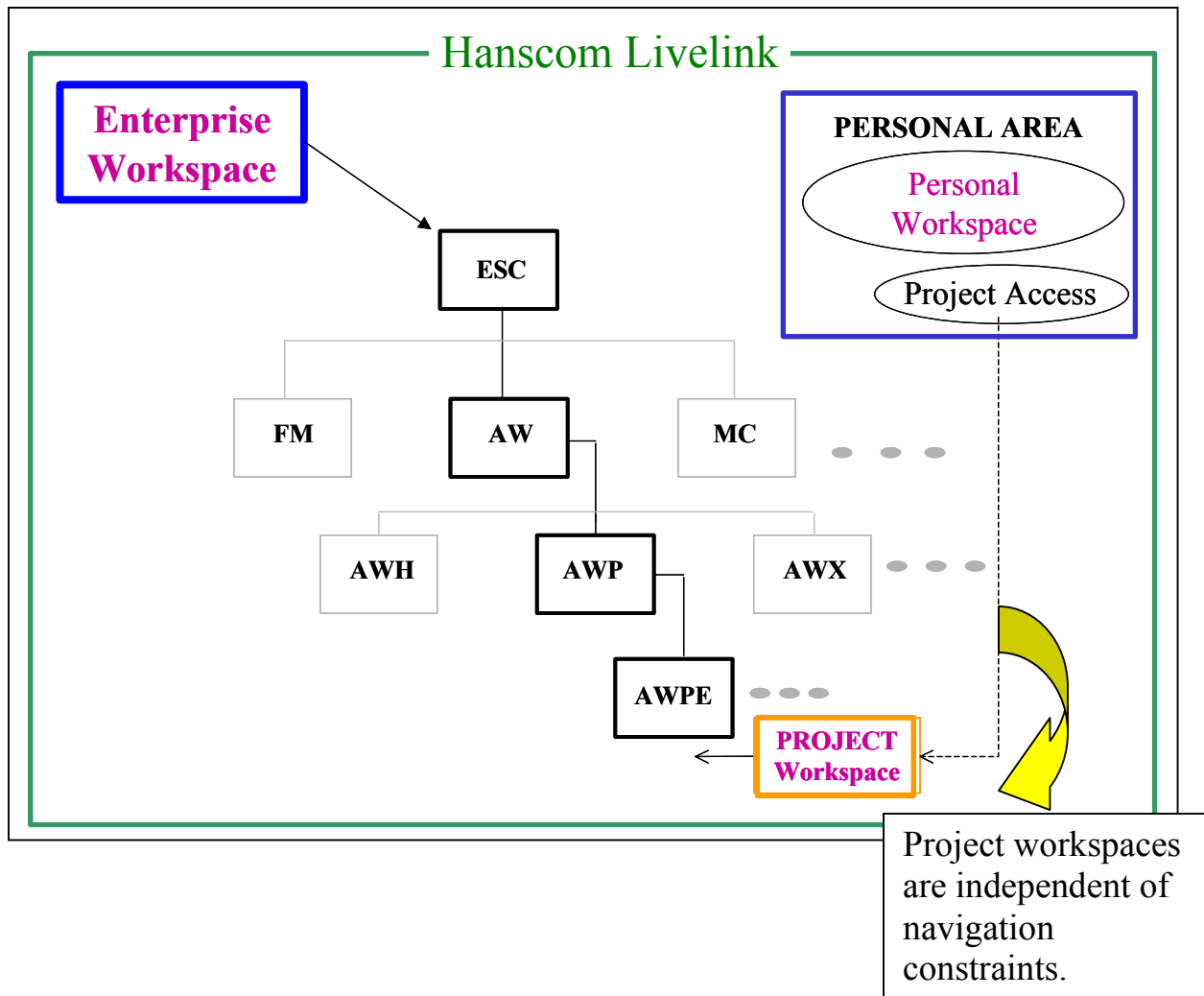


Windows Explorer Search

The Windows Explorer Search is different from the ESCLive search. A Windows Explorer Search searches desktop and shared drives only; it does not include ESCLive. ESCLive search will be covered in Exercise 8.




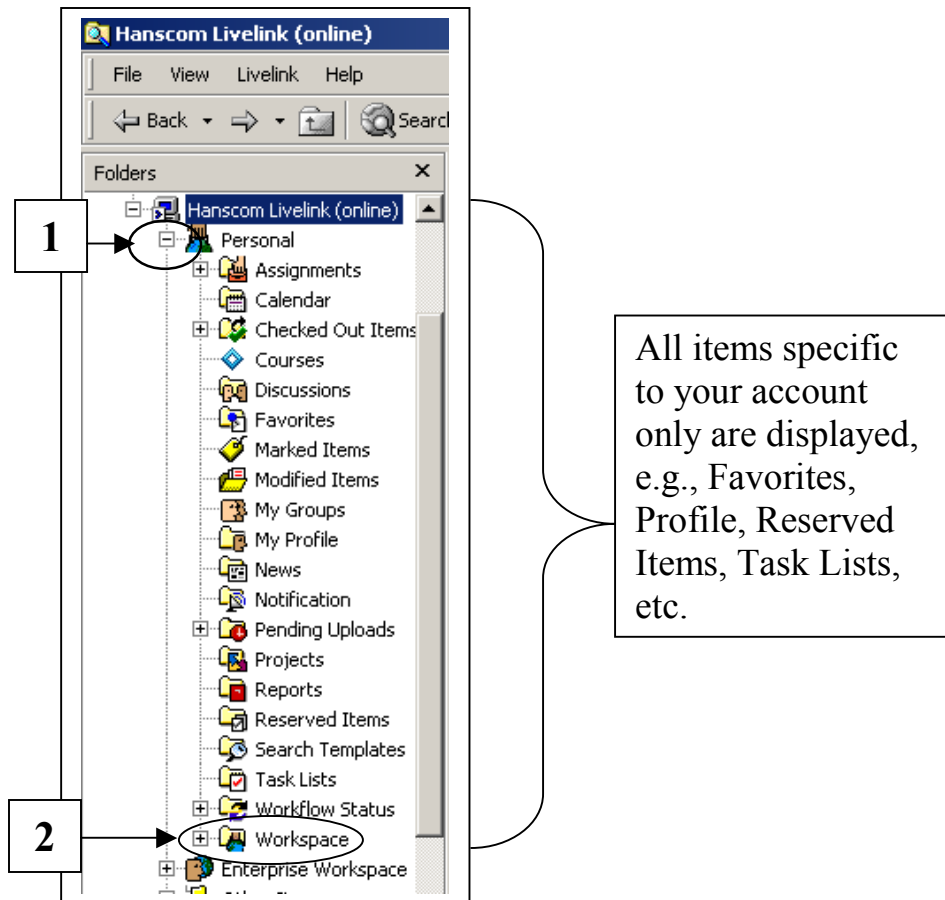
Hanscom Livelink and Workspaces



Personal Workspace

- An area that is private to an individual user.
- Only the individual user can navigate to his/her own **Personal** workspace.
- By default, every object placed in the **Personal** workspace is private to that individual.

1. To access your personal items, first expand the Personal icon  located toward the top of the Hanscom Livelink (online) listing.
2. To access the **Personal** workspace click on **Workspace**. Your **Personal** workspace may be empty at this time.

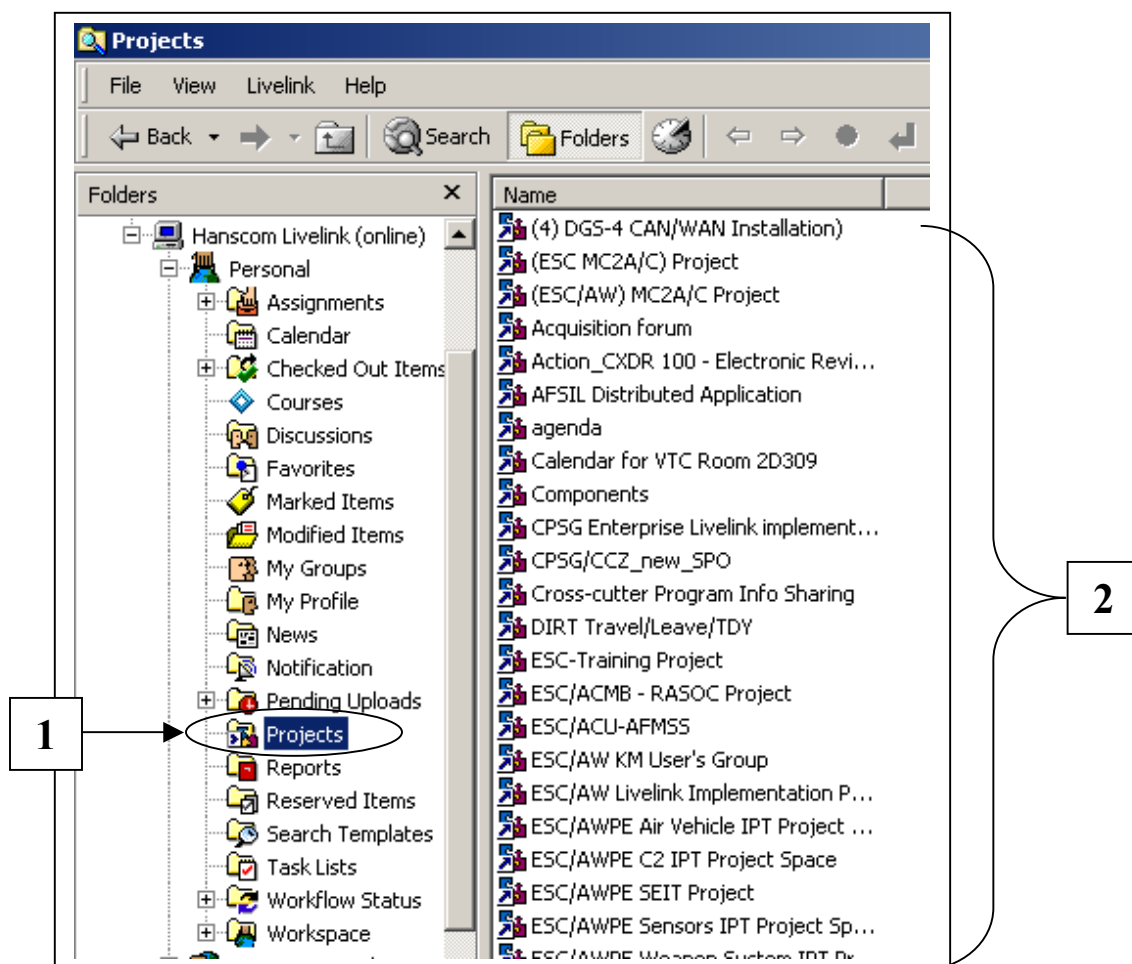


Project Workspace

A Project Workspace provides an area for users and groups from various organizations to share information and are independent of navigation constraints.

Example: Users from ESC/FDM and CPSG/DIW, with appropriate permissions, can access the ESC/AWPE SEIT Project workspace located in the ESC/AWPE folder without having to navigate through folders.

1. On the left side under your Personal items, click on **Projects**.
2. A list of projects for which you have access appears on the right.



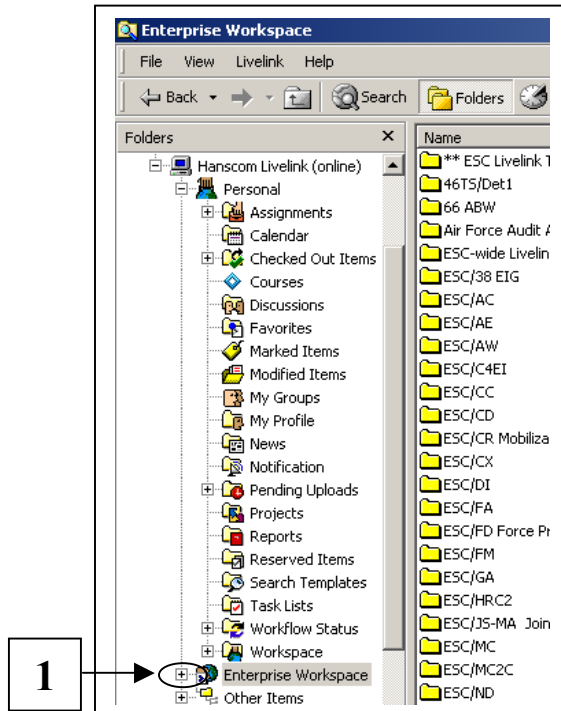
3. If there are any projects listed on the right, simply double-click on the appropriate project to access it.

Note that no navigation was required to access the project workspace.

Enterprise Workspace

Area used to store most organizational information.

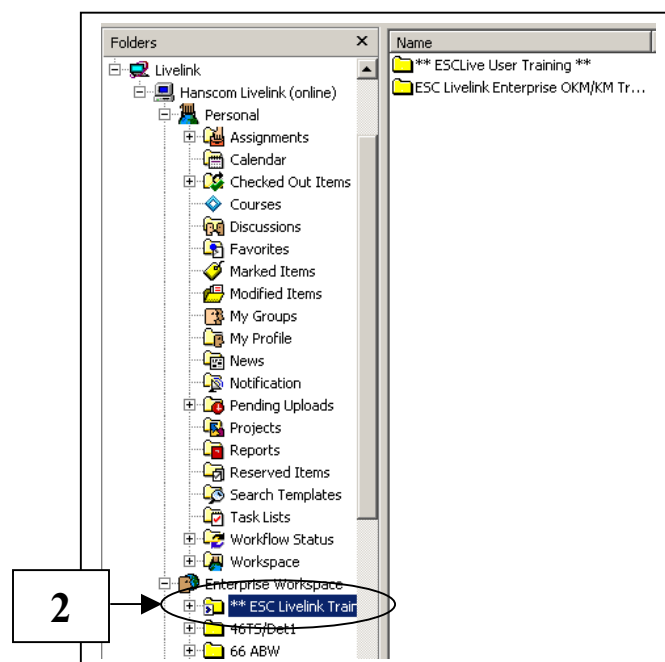
1. Expand the Enterprise Workspace, the area used to store most organizational information.



*** Note ***

- At ESC, information placed in Enterprise Workspace folders should be made accessible to all ESC Livelink users unless there is a compelling reason to limit that accessibility.

2. Click on the **** ESC Livelink Training **** folder. Contents of the workspace will appear on the right.



Making a Favorite

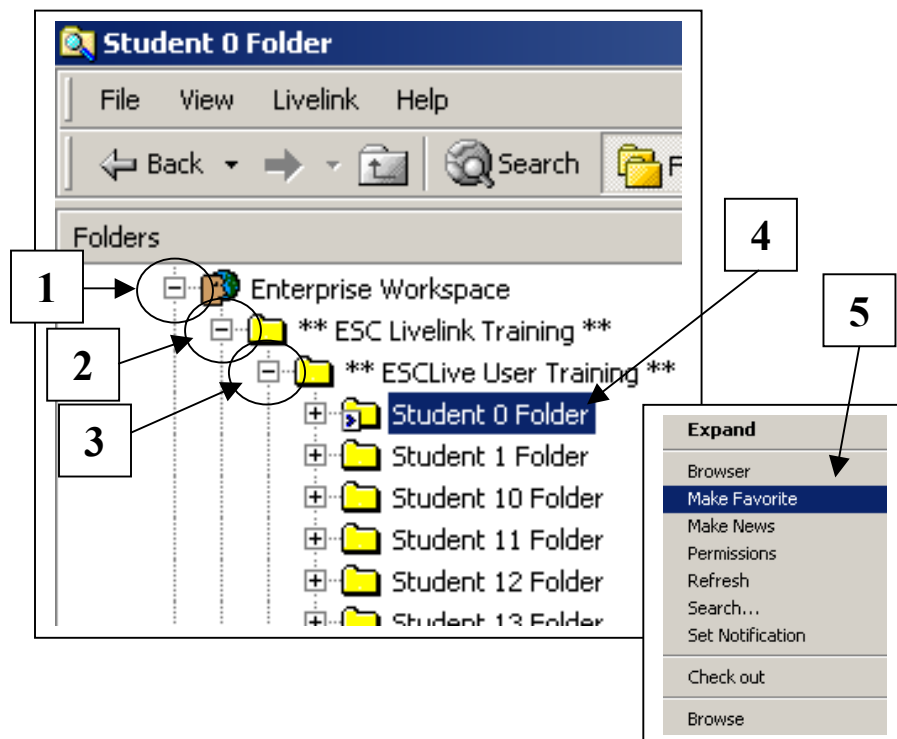
Favorites are shortcuts or bookmarks that allow you to eliminate levels of navigation within ESCLive. You can make a Favorite to any object in Livelink. Clicking on a Favorite link immediately takes you to that location, bypassing all navigation levels.

1. Expand the **Enterprise Workspace**
(should already be done).
2. Expand **** ESC Livelink Training ****
(should already be done).
3. Expand **** ESCLive User Training ****
4. Locate your **Student # Folder** and right click.

For SANDBOX users only:

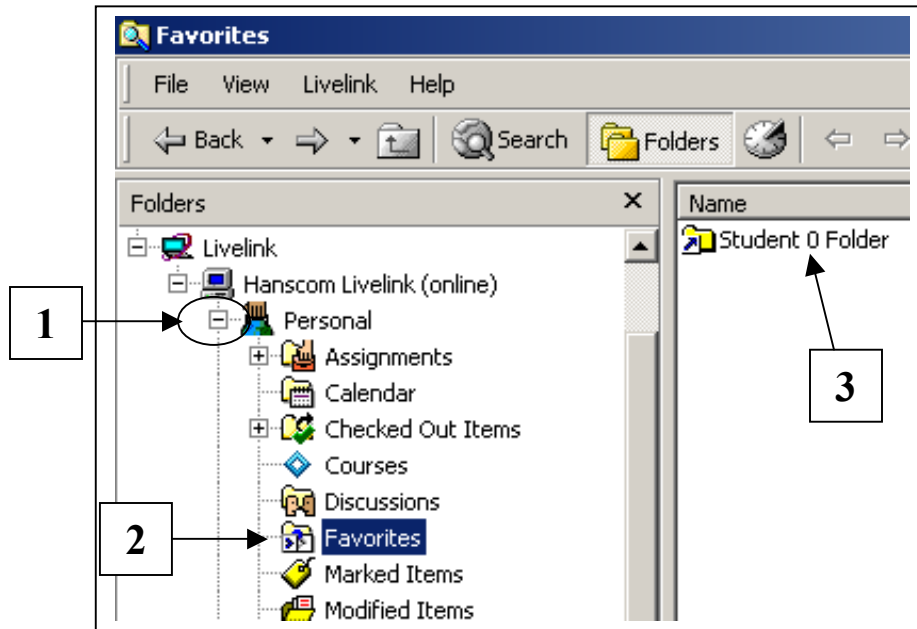
Before proceeding, create your own student folder in the SANDBOX. You'll find sandbox directions in Appendix I.


5. Select **Make Favorite** from the **Function** menu.



Accessing Favorites

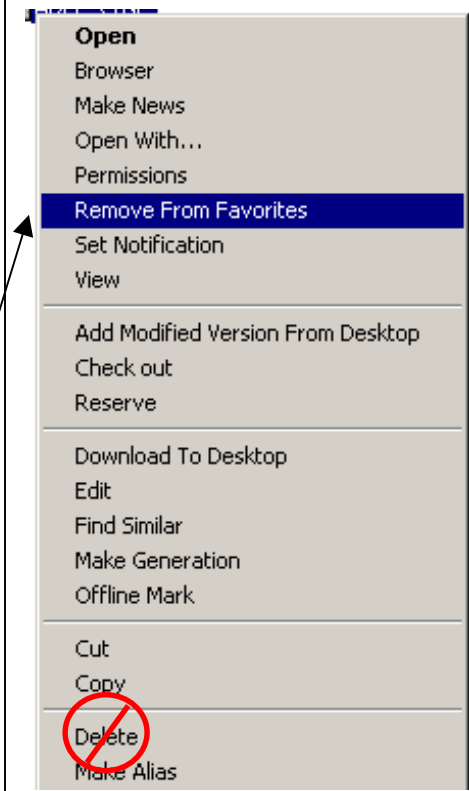
1. Scroll up and expand your **Personal** icon.
2. Click on **Favorites**.
3. Your **Student # Folder** will appear in the favorites list on the right.





*** CAUTION ***

If you want to get rid of a favorite, do not use the **Delete** option. If you use the delete option you will delete the favorite AND the original object!!! Instead, after right-clicking the object, use the **Remove From Favorites** option to remove favorites. Or use the **Make Alias** menu item covered in Exercise 5.

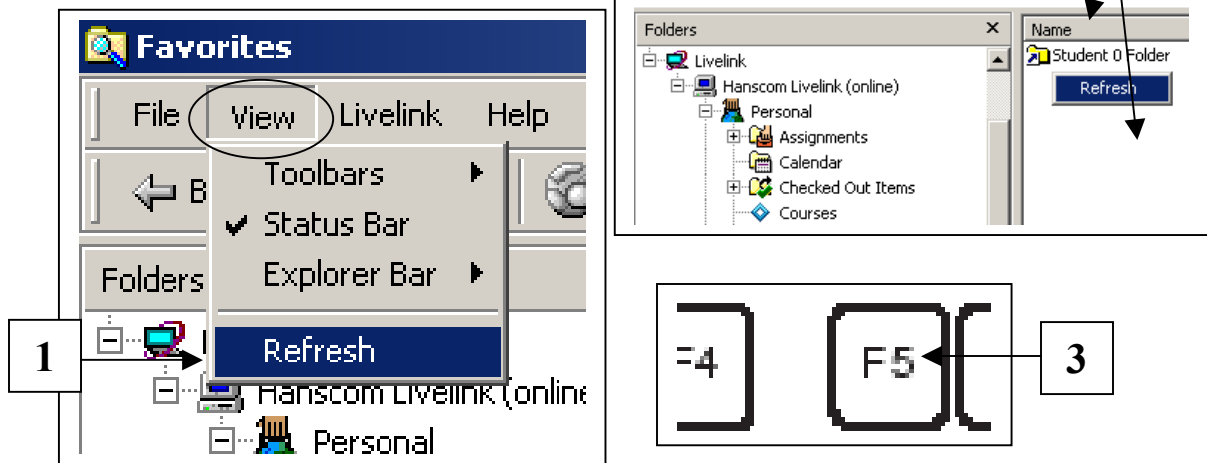


The context menu shows the following options: Open, Browser, Make News, Open With..., Permissions, Remove From Favorites (highlighted), Set Notification, View, Add Modified Version From Desktop, Check out, Reserve, Download To Desktop, Edit, Find Similar, Make Generation, Offline Mark, Cut, Copy, Delete (crossed out with a red circle), and Make Alias.

Refresh

To clear any temporary problems on your screen, refresh your screen by:

1. From the **View** menu, select **Refresh**, or
2. Right click on a blank area of the screen or a heading bar and select Refresh, or
3. Depress the F5 key



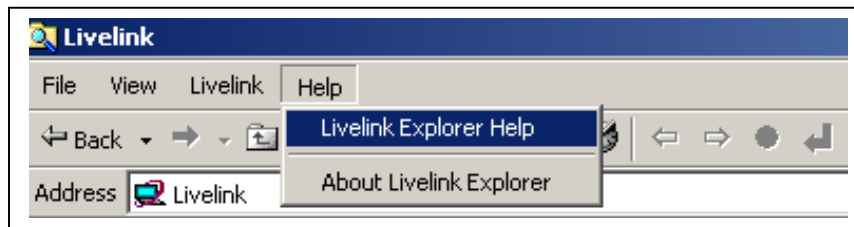
*** NOTE ***

Refresh is your “first line of defense” for troubleshooting any problems you encounter.

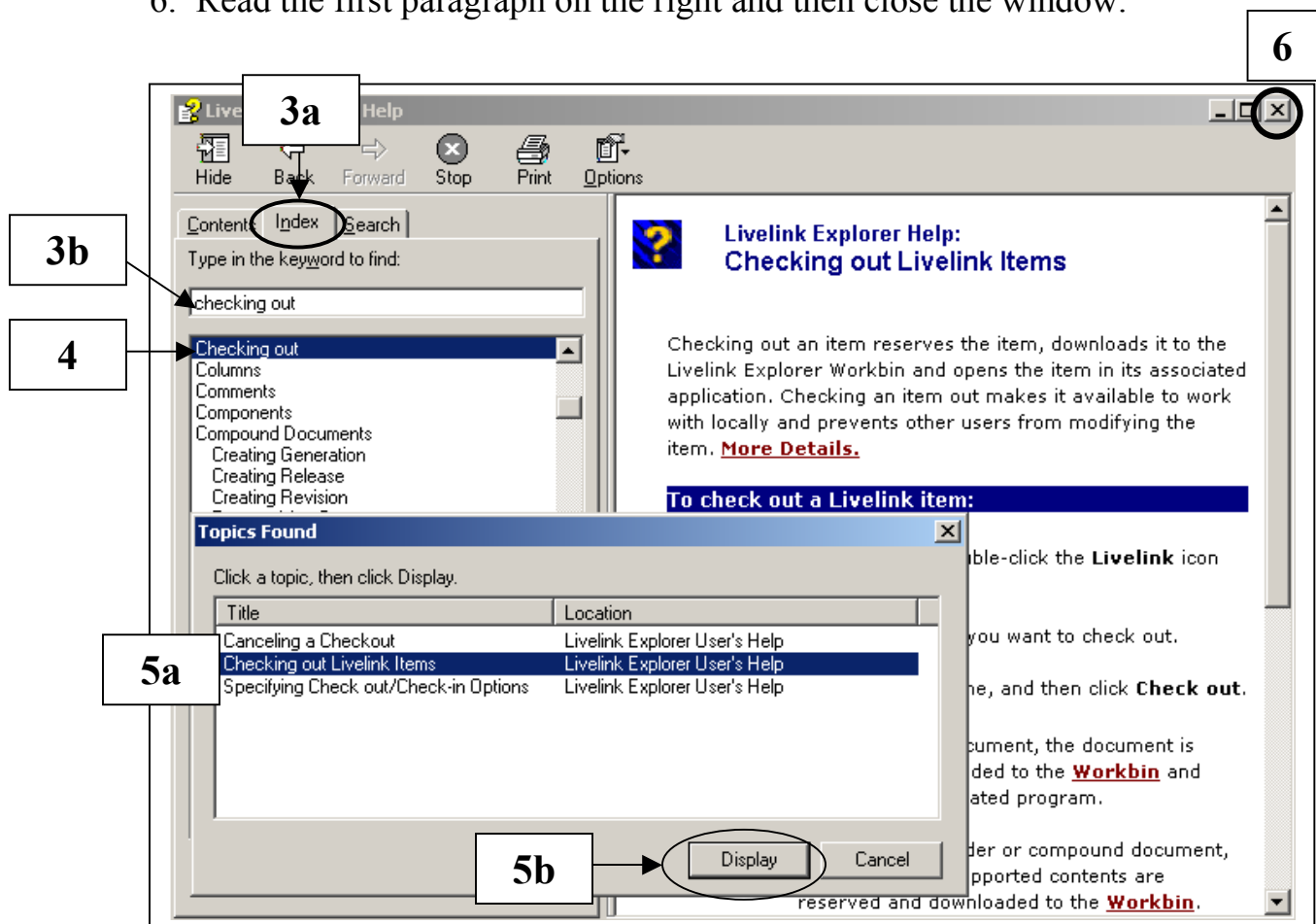
- Refresh
- Refresh again
- Help
- Reboot
- Ask your KM and OKM
- Send e-mail to [Hanscom Livelink](#)
- Call Livelink Team (See Appendix A)

Help (Not a Class Exercise)

1. From the **Help** menu, select **Livelink Explorer Help**.



2. The Help window opens.
3. a) Click on the **Index** tab. (b) In the keyword field, enter the topic **checking out**.
4. In the list below, double-click on the **Checking out** topic.
5. A second window appears below. a) Highlight **Checking out Livelink Items**. b) Click the **Display** button.
6. Read the first paragraph on the right and then close the window.



END EXERCISE 2

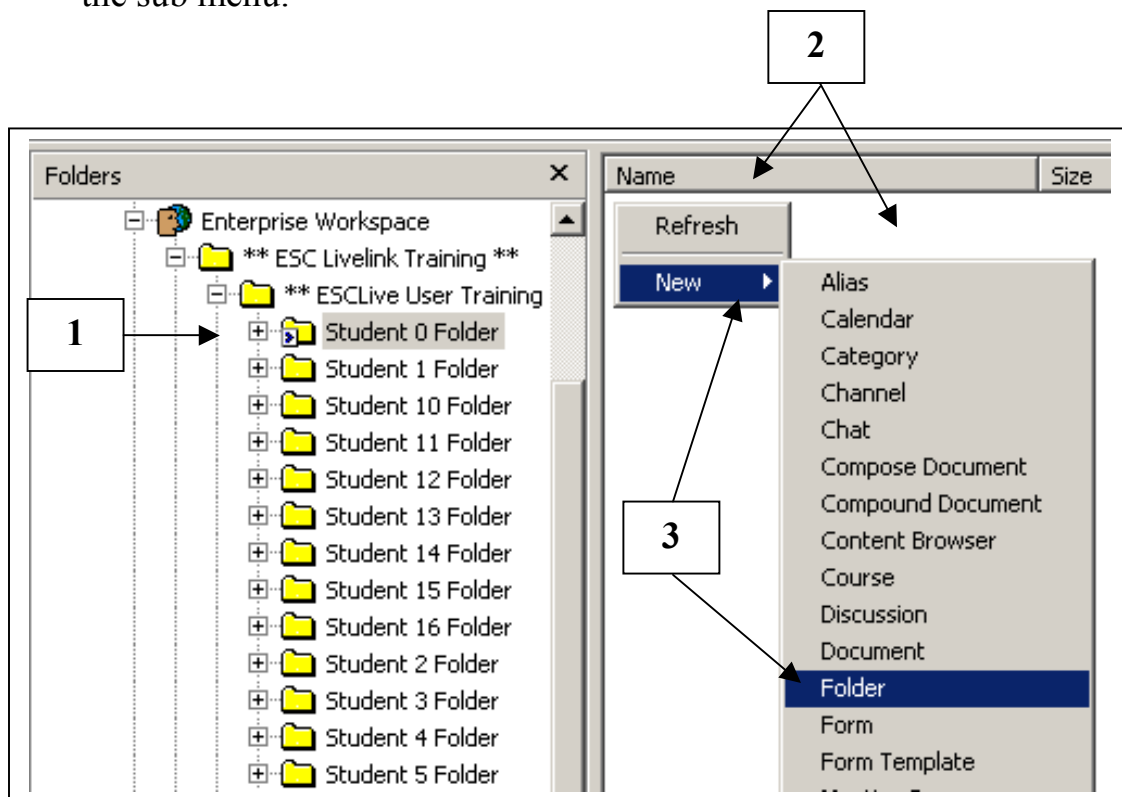
EXERCISE 3: ADD FOLDER



Use folders to create an organized structure for your documents and other objects in ESCLive.

Exercise Overview: In this exercise, you will add a “sub” folder in your **Student # Folder** and then check permissions for that folder.

1. If you have not done so already (from the previous exercise), click on your **Student # Folder**. Note the folder is highlighted and includes an arrow to indicate it is currently selected.
2. Move your cursor to somewhere on the right screen (other than on an object) and right click.
3. When a small menu appears, select **New** and then select **Folder** from the sub menu.



4. The **Add: Folder** description page will appear (in Web view).

ers

4

Add: **Folder**

Search Livelink Intranet for: Enterprise [Advanced...](#)

Name: Personnel Info Folder 5

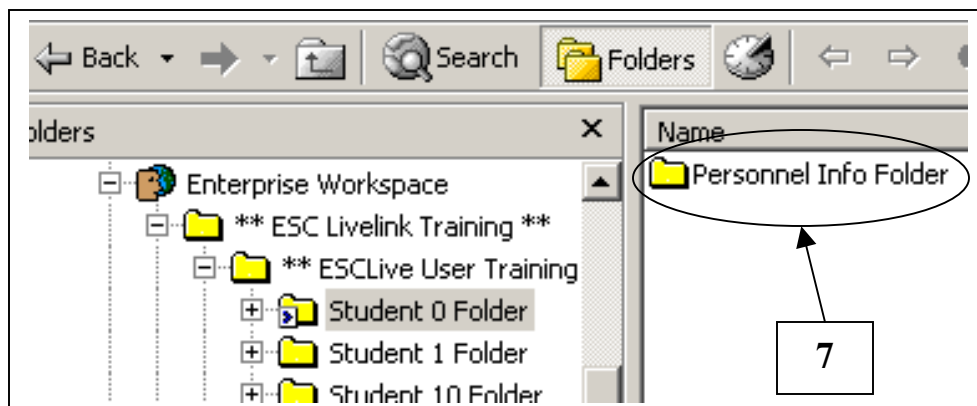
Description:

Categories:

Create In: Student 0 Folder

6 Action:

5. In the **Name:** field, name the folder “**Personnel Info Folder.**” Note that Livelink has already filled in the location of your **Student # Folder.**
6. Press the **Add Item** button to save your change to the database.
7. You will be returned to the Explorer view. Notice that you now have a **Personnel Info Folder** in your **Student # Folder.**



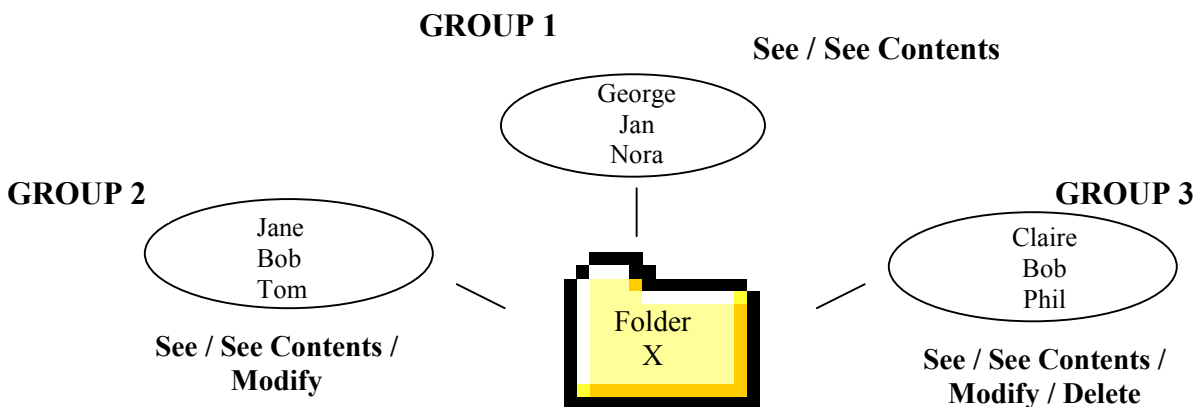
*** BEST PRACTICE ***

The Best Practice Naming Convention for naming containers in ESCLive is to follow the organizational structure of where the container is located (e.g. ESC/AWXO, 66ABW/SC). The importance of this naming convention will become apparent when we cover search in Exercise 8.

Permissions

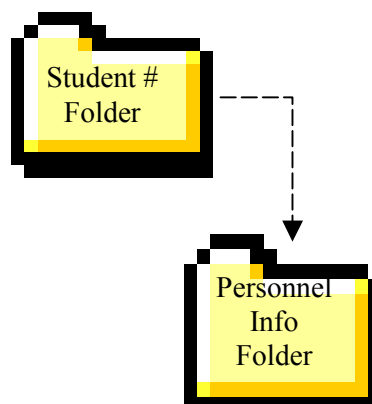
Permissions allow users and/or groups to control access to objects in various ways in ESCLive. You can view and set permissions for any object you create and/or to which you have Modify Permission authority.

Different groups can have different levels of access to the same object. The illustration below depicts a container with access by three different groups. Each group has a different set of permissions. Note that Bob is a member of Group 2 and Group 3. His overall permission level is that of the group with the most access -- Group 3.



*** BEST PRACTICES ***

- Since objects automatically inherit the permissions set from the “parent” container, it is a Best Practice to manage permissions at the container level (e.g., folder, project workspace) first.
- Permissions should be assigned to groups, not individuals.



***** NOTE *****

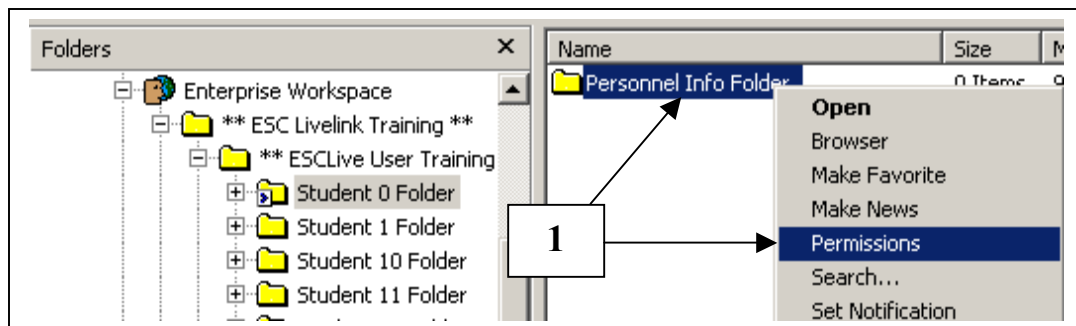
End users cannot create new groups. However, end users can assign existing groups permission to objects they own.

Only Organizational Knowledge Managers (OKMs), Knowledge Managers (KMs), and system administrators can create groups.

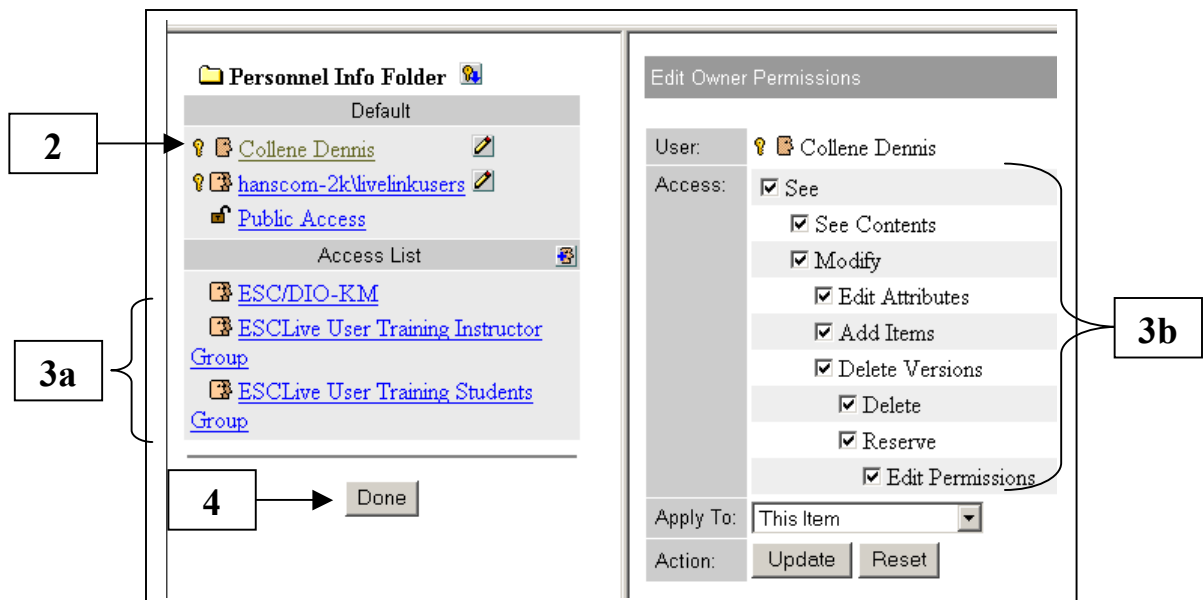
View Permissions

If you have Modify Permission authority for an object, you can view the permissions for that object.

1. Right click on your **Personnel Info Folder** and select **Permissions**.



2. Click on your name at the top left. The list of your permissions appears on the right. Since you created this object, you have the full set of permissions.



3. Note that a) the Access List, and b) Permissions already contain entries. These were automatically inherited from your **Student # Folder** (the parent container).

For newly created items, a good practice is to check the permissions of each group. Click on each group in the Access List and view the permissions for each of those groups.

Permission Definitions

PERMISSION TYPE	DEFINITION
None	Cannot see that the object exists
See	Only the name of the object appears in the workspace. Cannot click on object, view it, or read its metadata.
See Contents	Can click on the object and view its contents and metadata. *** This permission must be selected for users to read/view an object. ***
Modify	Can change the content of objects.
Edit Attributes	Can change the name and description of the object.
Add Items	Can add new objects (e.g., folders, documents, aliases, URLs, etc.)
Delete Versions	Can only delete <u>versions</u> of <u>documents</u> ; cannot delete the document object permanently from the database.
Delete	Can permanently delete the object from the database.
Reserve (Documents)	Can reserve the document and add a new version to the document.
Edit Permissions	Can change the permission of the object.

4. Click on the **Done** button.



***** WARNING *****



The ability to define permissions is an extremely powerful feature of Livelink but it is also one of the most easily misunderstood. **Always** check with your OKM or KM before changing or modifying permissions on any object.

END EXERCISE 3

EXERCISE 4: DOCUMENT FUNCTIONS

In ESCLive, the term “document” includes any electronic file in any format, from any application. A non-inclusive list of examples are: Word files, Excel files, PowerPoint files, graphic files (e.g., .bmp, .gif, .jpg), Project files, Adobe files, video files, and zipped files.

Microsoft Word, Excel and PowerPoint Documents.

Although all document types can be managed in the ESCLive, the following Microsoft applications are tightly integrated with Livelink Explorer Pro (i.e., Livelink functionality is built into these applications):

- Word
- Excel
- PowerPoint

Since the above programs have a Livelink menu imbedded into the application, creating, opening, modifying, and saving these documents into ESCLive can easily be done from within the Microsoft application.

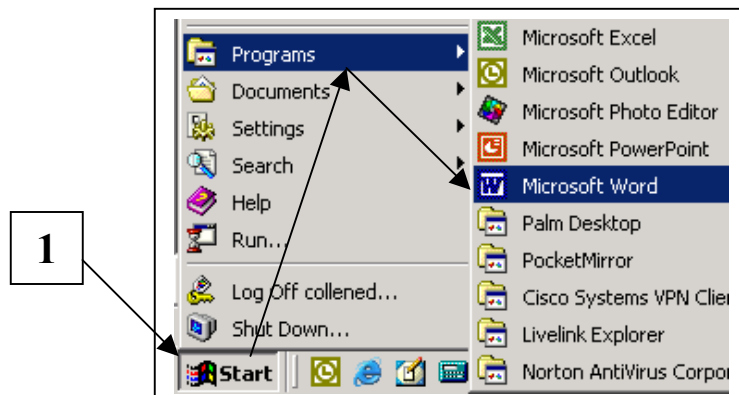
Documents from all other applications are managed a bit differently in ESCLive and are discussed later in this section.

Exercise Overview: In the following exercise, you will create a Word Document, and then add the document to your **Personnel Info Folder** that you created inside your **Student # Folder**.

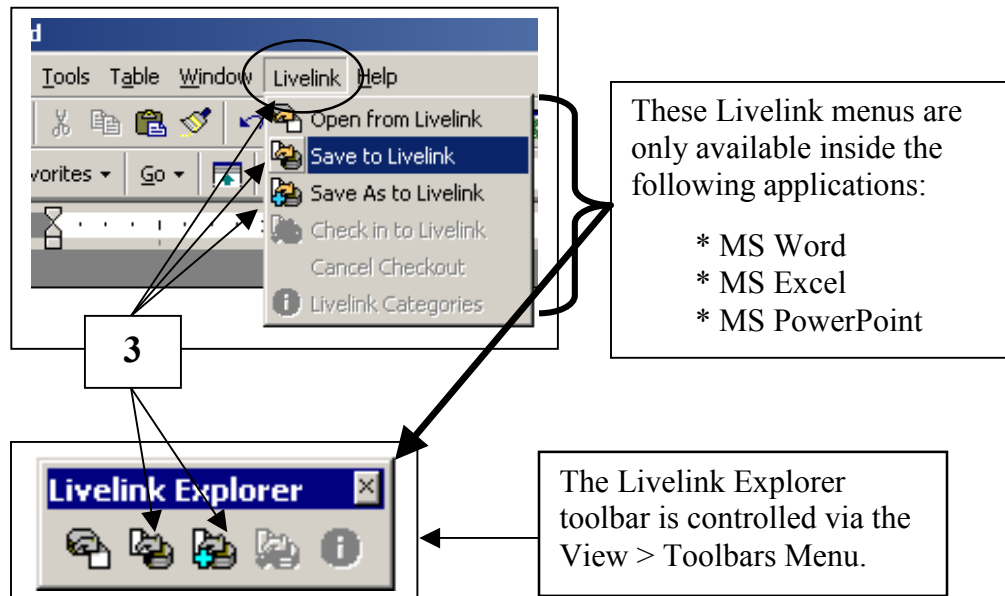
Create a Document



1. From the **Start** menu, open the Microsoft Word application



2. Type one or two short statements about your job.
3. Click the **Livelink** menu at the top of the page and select **Save to Livelink** (or **Save As to Livelink**). *(Or you may want to use the Livelink Explorer Toolbar, if it is visible, to accomplish the same task.)*



***** NOTE *****

Although all document types can be managed in ESCLive, only MS Word, Excel and PowerPoint have a Livelink menu built into the application.

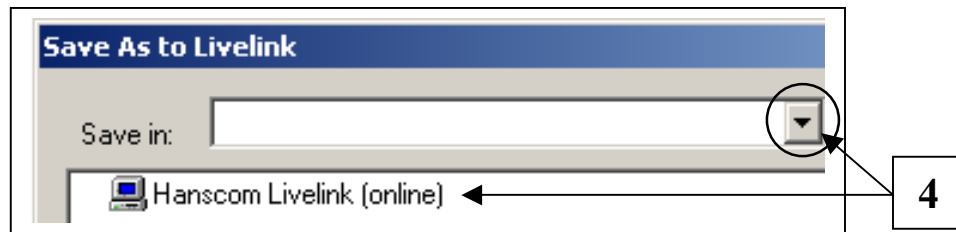
Since these programs have a Livelink menu embedded into the application, creating, opening, modifying, and saving these documents into Livelink can easily be accomplished from within the application.

All other types of documents are managed a bit differently in ESCLive and are discussed later in this section.

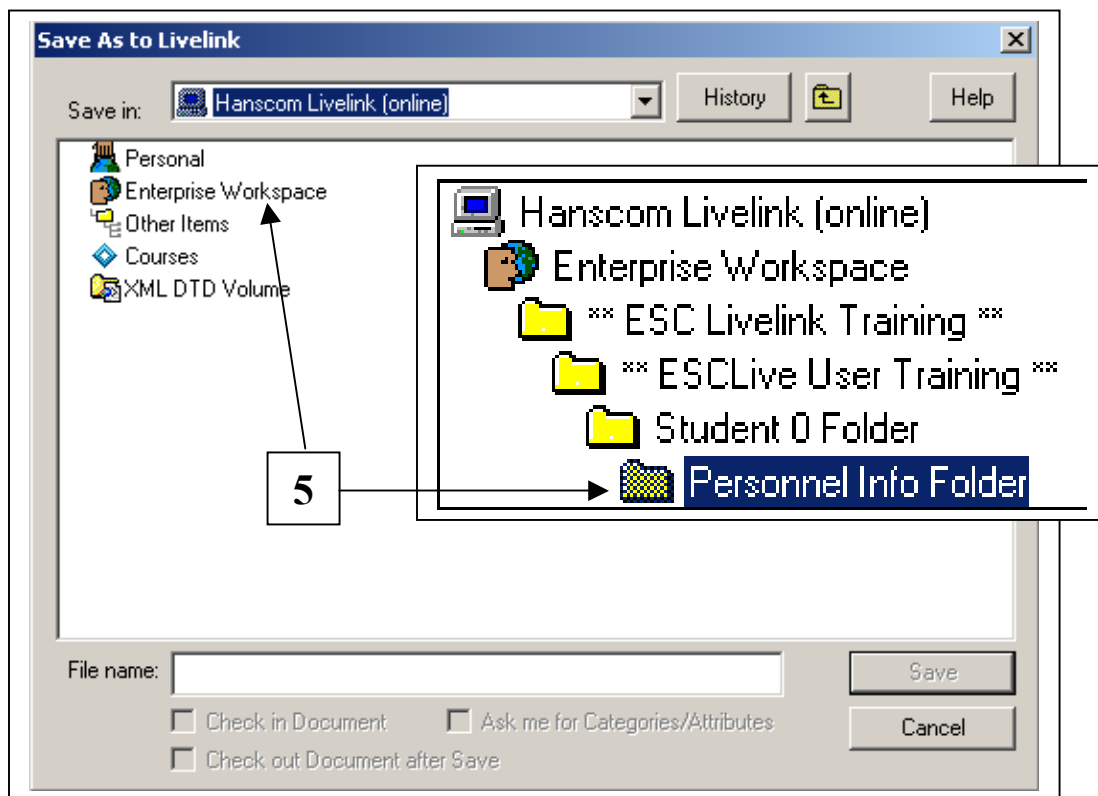
***** NOTE *****

Saving a document to Livelink will not save it to your PC's hard drive – it will only save it to Livelink.

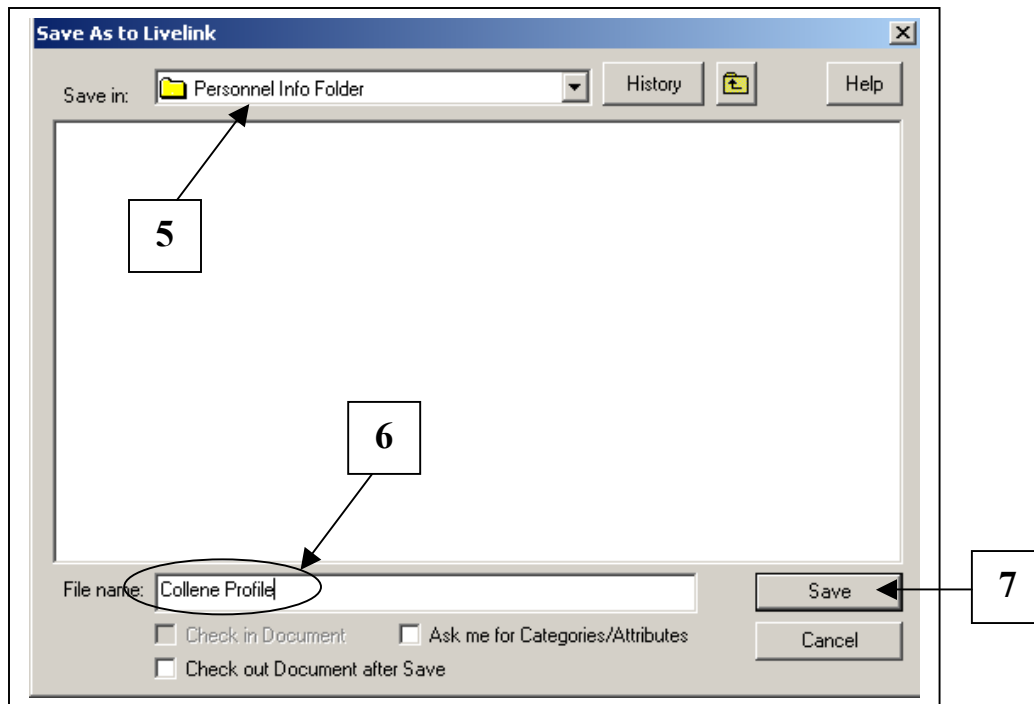
4. The Save As to Livelink window will open. In the **Save in** field, double-click on **Hanscom Livelink (online)**. (Or you may have to access it from the drop-down menu.)



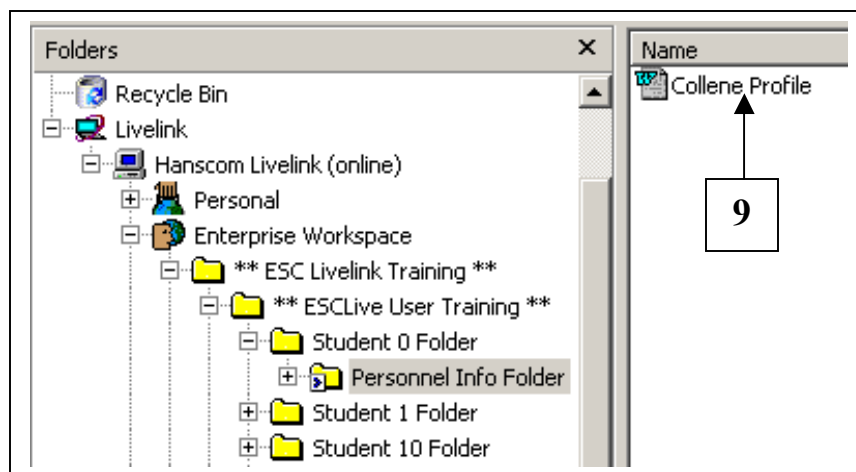
5. Starting with the **Enterprise Workspace**, drill down (double-click) down the training folder structure until you reach your **Personnel Info Folder** (see inset for path). The **Save in:** field should now contain the words **Personnel Info Folder**.



6. An automatically generated name is sometimes entered in the **File name:** field. If so, simply highlight this field and enter your last name with the word Profile.



7. Click the **Save** button. Your document is now saved to Livelink; it is not saved to your PC's hard drive.
8. Close (X) Word.
9. Double-click on your **Personnel Info Folder** to see your **Lastname Profile** document.



Check Out

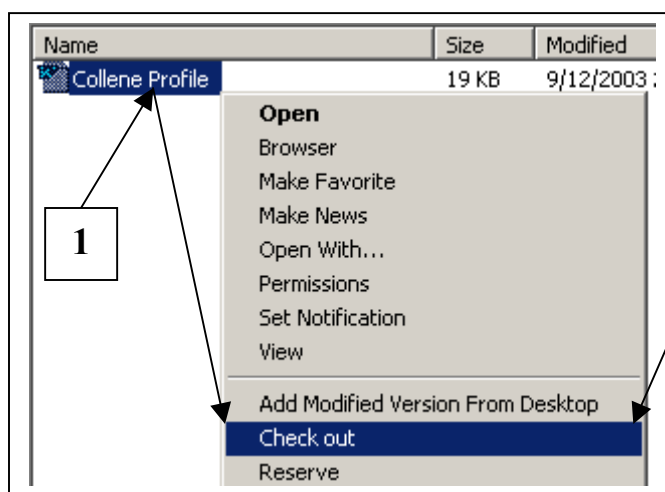
Purpose of Check Out: Checking out a document helps ensure version control for modification purposes. For example, if multiple people need to make changes to a document, Check Out helps ensure that only the current version of the document is modified. Even when checked out, anyone with See Contents (read) permission can view the document.

The **Check out** function applies to all document application types residing on your PC and automatically performs three steps:

- Downloads the document to your local PC memory.
- Reserves the document in ESCLive. While reserved, no one can add a new version or delete the document, but anyone with at least See Contents permission can view the document.
- Opens the document in its native application. This would be any application resident on your PC (e.g., Word, Excel, PowerPoint, MS Project, Video, etc.)

In this exercise, you will check out a document, modify it, and then check it in again as a new version. You will then review its versions, general information (metadata) and audit trail.

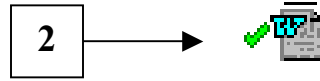
1. Right click on the **Lastname Profile** document you just saved and select the **Check out** menu item.



Check out automatically:

- Downloads the document to your local desktop memory.
- Reserves the document in ESCLive.
- Opens the document in its native application (e.g., Word).

2. Your document will open in Word. The document is now reserved and only the person who checked it out can add a new version. Should anyone look at the document, it would show a check mark to indicate that it is reserved. *(You may want to minimize MS Word, see for yourself that the checkmark is present, and then maximize MS Word again.)*



3. Add another fact about your job to the document.

***** REMINDER *****

While the document is checked out, only the person who has checked it out can add a new version to the document.

Also, the document cannot be deleted while it is checked out.

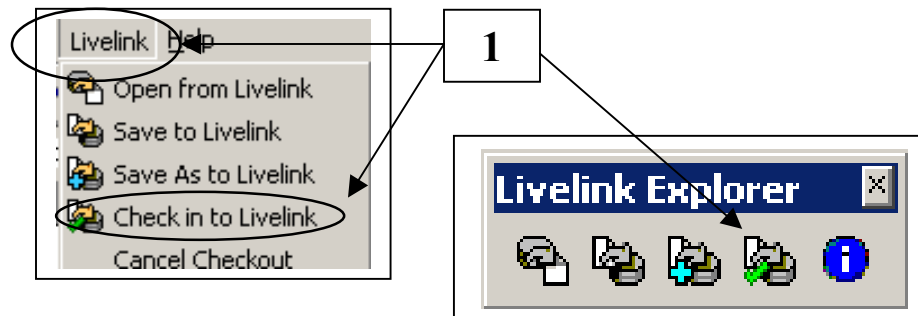
However, all users who have at least **See Contents** permission can still read (View) the document.

Check In

Purpose of Check In: Checking in:

- saves your document as a new (and latest) version in ESCLive (not your PC)
- un-reserves the document and allows other users with the appropriate permission to make changes to the document
- closes the Word file

1. From the **Livelink** menu or from the Livelink Explorer toolbar, click **Check in to Livelink**.



***** REMINDER *****

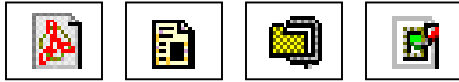
The **Livelink** menu inside of Livelink Explorer Professional is only available in Microsoft Word, Excel and PowerPoint applications.

***** NOTE *****

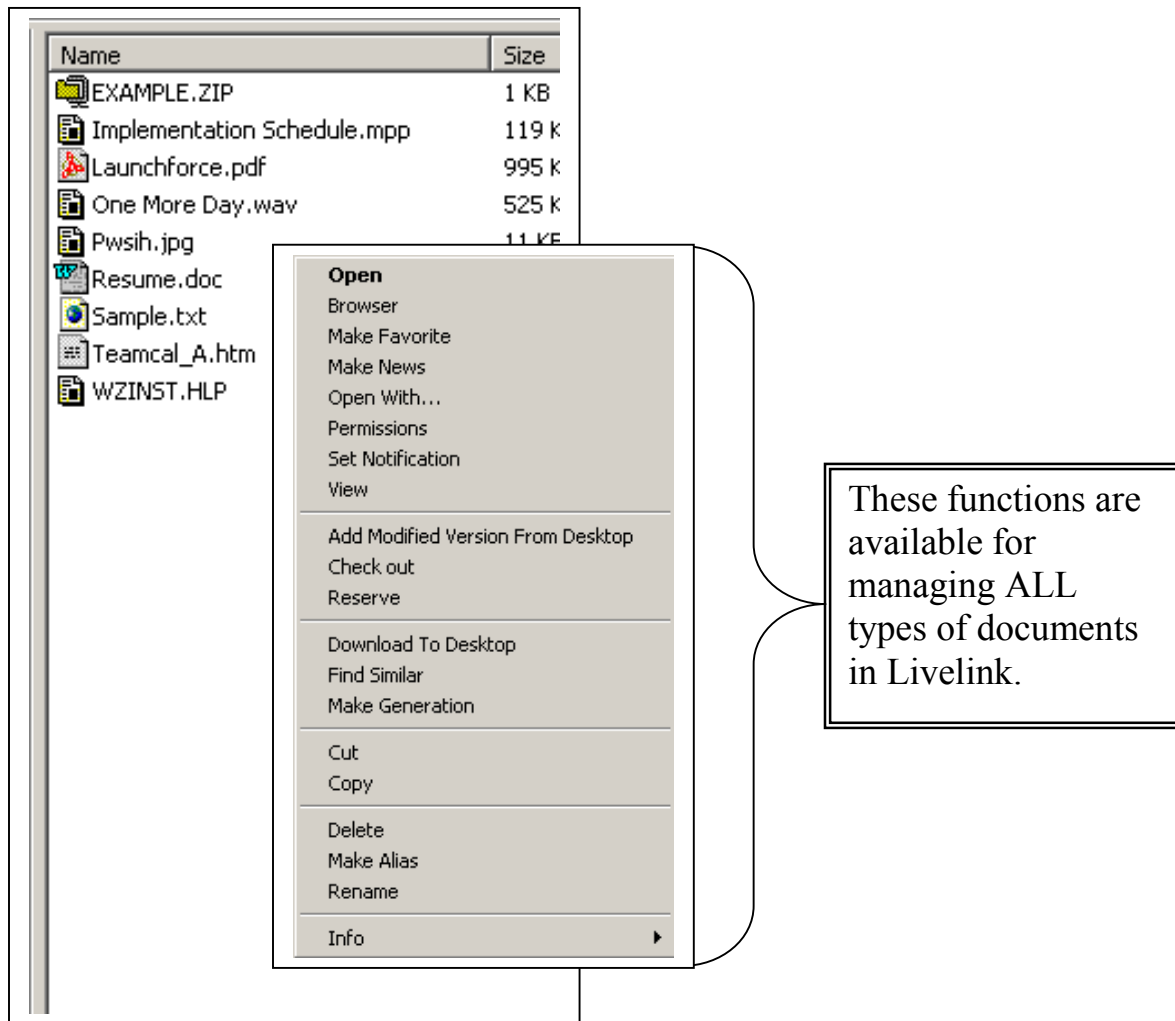
To check in all other types of documents from the Explorer view, right-click on the document and select **Check in** from the menu.

2. Close (X) Word.

Documents Other than Word, Excel or PowerPoint (*Not a Class Exercise*)



All types of documents (e.g., zipped files, Adobe files, graphic files, etc.) from any application can be stored and managed in Livelink.



Creating a Document

To add documents other than Word, Excel and PowerPoint to ESCLive you must:

1. Create the document in its native application (e.g., MS Project) and save the document to your desktop.

2. Upload the new document into ESCLive using either the drag-and-drop method (Covered later in this Exercise) or by right clicking on the right side and selecting **New > Document** (similar to adding a new folder which was covered in Exercise 3).

Editing a Document

One way to edit a document other than Word, Excel and PowerPoint and store the edited document as a new version in ESCLive is to:

1. In ESCLive, right click on the document and select **Check out**. (This will reserve the document and open it up in its native application in local memory.)
2. Edit the document.
3. Save the document to your PC.
4. In ESCLive, right click on the document and select **Check in**. (Check in un-reserves the document, closes the file, and adds a new version of the document in ESCLive.) *(You will see an Add Version screen and you may want to add a description of the version at this point.)*

Another way to edit a document other than Word, Excel and PowerPoint and store the edited document as a new version in ESCLive is to:

1. **Reserve** the document and then download the document to your desktop using the **Download To Desktop** menu item.
2. Open and edit the document in its native application (e.g., MS Project) and save the document back to your desktop.
3. Upload a new version of the edited document into Livelink by right clicking the document name in ESCLive and select the **Add Modified Version from Desktop**. Then right click the document in ESCLive and select **Unreserve**.

Refer to Livelink Explorer Help for more information

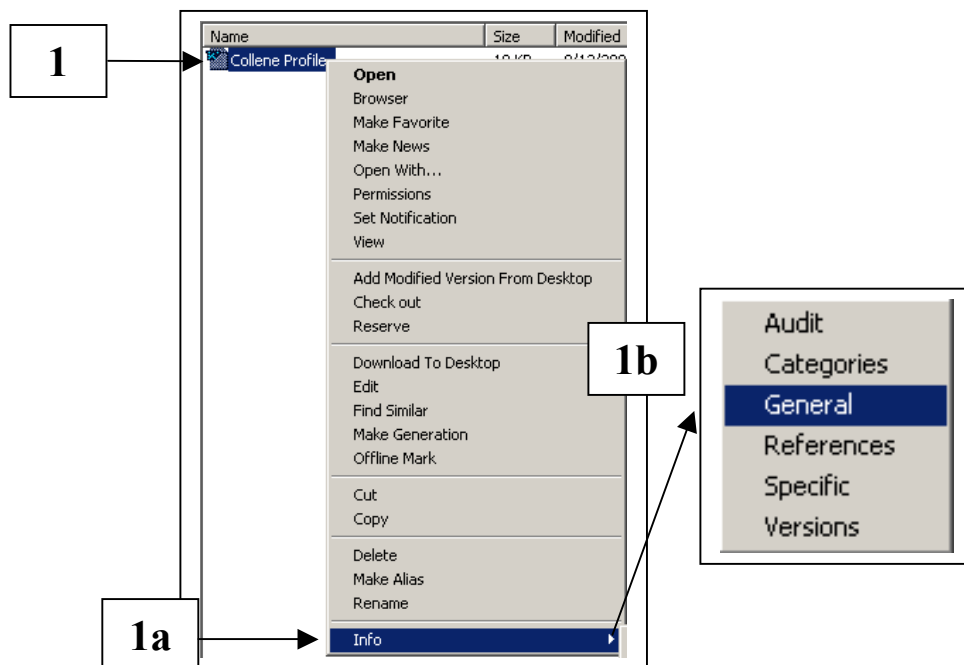
Information About ESCLive Objects

Metadata

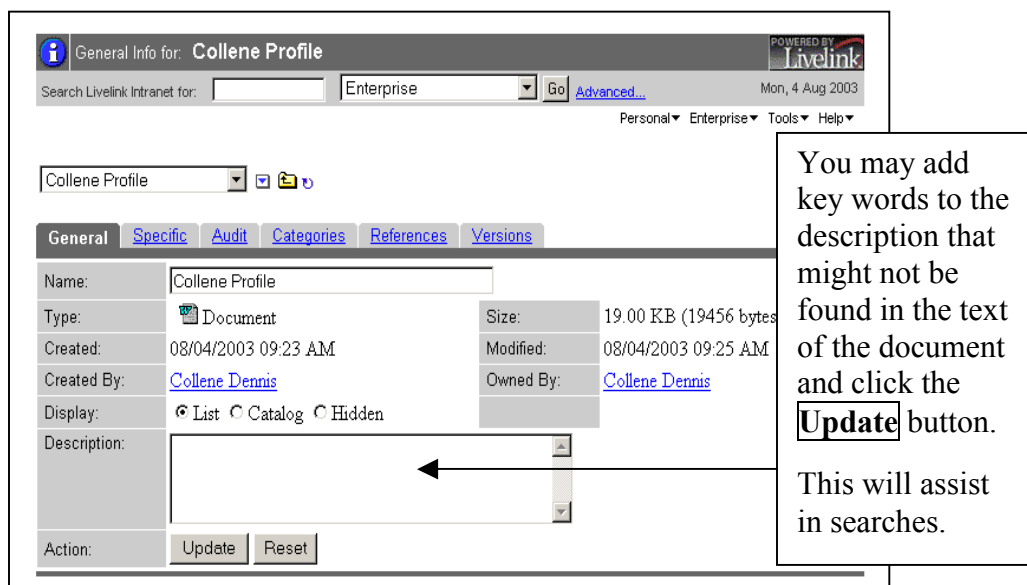
Metadata is information about an object. Examples of metadata are creator, name of the object, creation date, modification date, object description, etc.

To view the metadata of an object:

1. Right click on your **Lastname Profile** document. (a) Click **Info**, and then (b) click **General**.



2. A web view screen displays the document's metadata or attributes (e.g., date created, size, created by, etc.).



Versions (View, Purge and Delete)

A document in ESCLive can have multiple versions. Previous versions are NOT overwritten but are saved and can be viewed if desired. Users that have **Add Version** permission may create new versions of a document. Whenever a user clicks on a document, the latest version is always viewed.

1. Click the **Versions** tab to view the two versions of your **Lastname Profile** document.

Regardless of how many versions exist, only the latest version of the document is accessed.

Search Livelink Intranet for: Enterprise Go [Advanced...](#) Mon, 15 Sep 2003

Personal ▾ Enterprise ▾ Tools ▾ Help ▾

Collene Profile

[General](#) [Specific](#) [Audit](#) [Categories](#) [References](#) **Versions**

Version ↓	File Name	Functions	Size	Created	Created By
2	Collene Profile.doc	[icon]	19 KB	09/15/2003 08:05 AM	Collene Dennis
1	Collene Profile.doc	[icon]	19 KB	09/12/2003 02:09 PM	Collene Dennis

Versions To Keep:

Action: [Purge Versions](#) [Reset](#)

1 points to the Versions tab. 2 points to the Versions To Keep field. 3 points to the Functions column.

2. Users who have **Delete Versions** permission can elect to keep any number of versions and purge any unwanted versions. One way to delete versions is with the **Purge Versions** button in conjunction with the **Versions To Keep:** field. Whenever the **Purge Versions** button is selected, Livelink keeps the most current version (highest number), all locked versions and the next most recent versions up to the number in the **Versions to Keep:** field.
3. The other method of deleting versions is by selecting **Delete** under the appropriate version's **Function** menu. In order to delete a version, it must be unlocked. In order to delete a document, or a version of a document, or a folder containing a document with a locked version, the appropriate document's version must be unlocked.

*** NOTE ***

Since the **Purge Versions** method can be confusing, you may want to delete versions one at a time using the **Function** menu.

*** NOTE ***

From the **Function** button menu, you can **Lock** a specific version to prevent accidental deletion or to prevent a version from being changed (e.g. – a baseline financial or project document). (*See Help for more info on Lock.*)

Audit

1. Click the **Audit** Tab to review the audit trail of activity for your **Lastname Profile** document. The audit trail cannot be changed.

Collene Profile

1

General Specific **Audit** Categories References Versions

Event	Date ↓	User
Version Deleted	08/01/2003 02:27 PM	Collene Dennis
Version Added	08/01/2003 02:26 PM	Collene Dennis
Version Added	08/01/2003 02:26 PM	Collene Dennis
Version Added	08/01/2003 02:26 PM	Collene Dennis
Version Added	08/01/2003 02:25 PM	Collene Dennis
Version Fetched	08/01/2003 02:24 PM	Collene Dennis
Version Added	08/01/2003 02:22 PM	Collene Dennis
Attributes Changed	08/01/2003 02:22 PM	Collene Dennis
Create	08/01/2003 02:22 PM	Collene Dennis

Livelink © Version 9.1.0, Copyright © 1995-2002 Open Text Inc. All rights reserved.

Copying Documents via the Drag and Drop Method

You can copy, via drag-and-drop, individual documents or entire folders from your PC, or shared drive, into ESCLive.



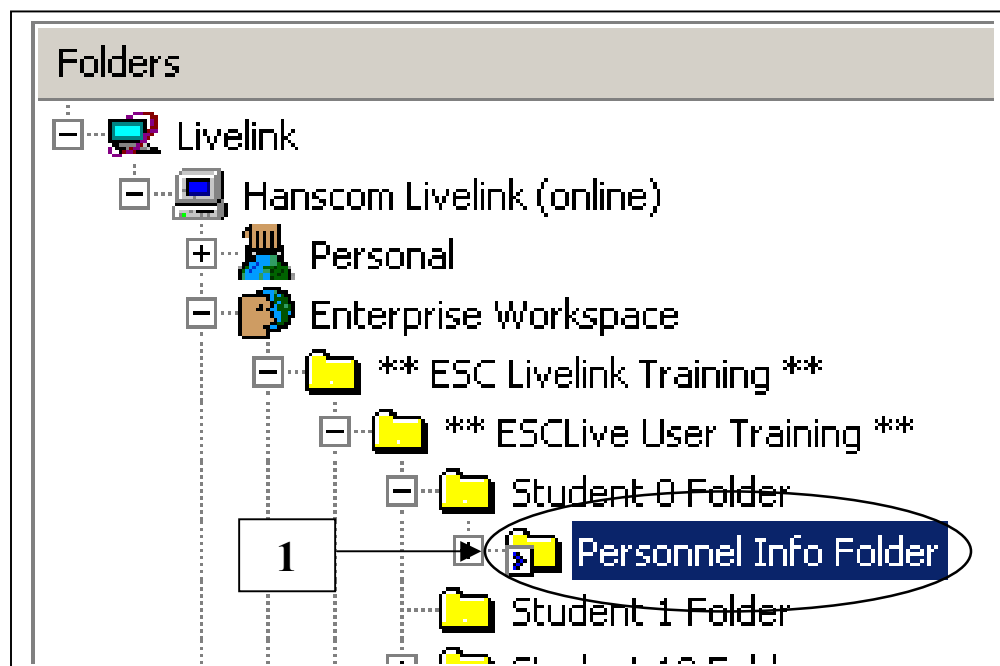
*** CAUTION ***



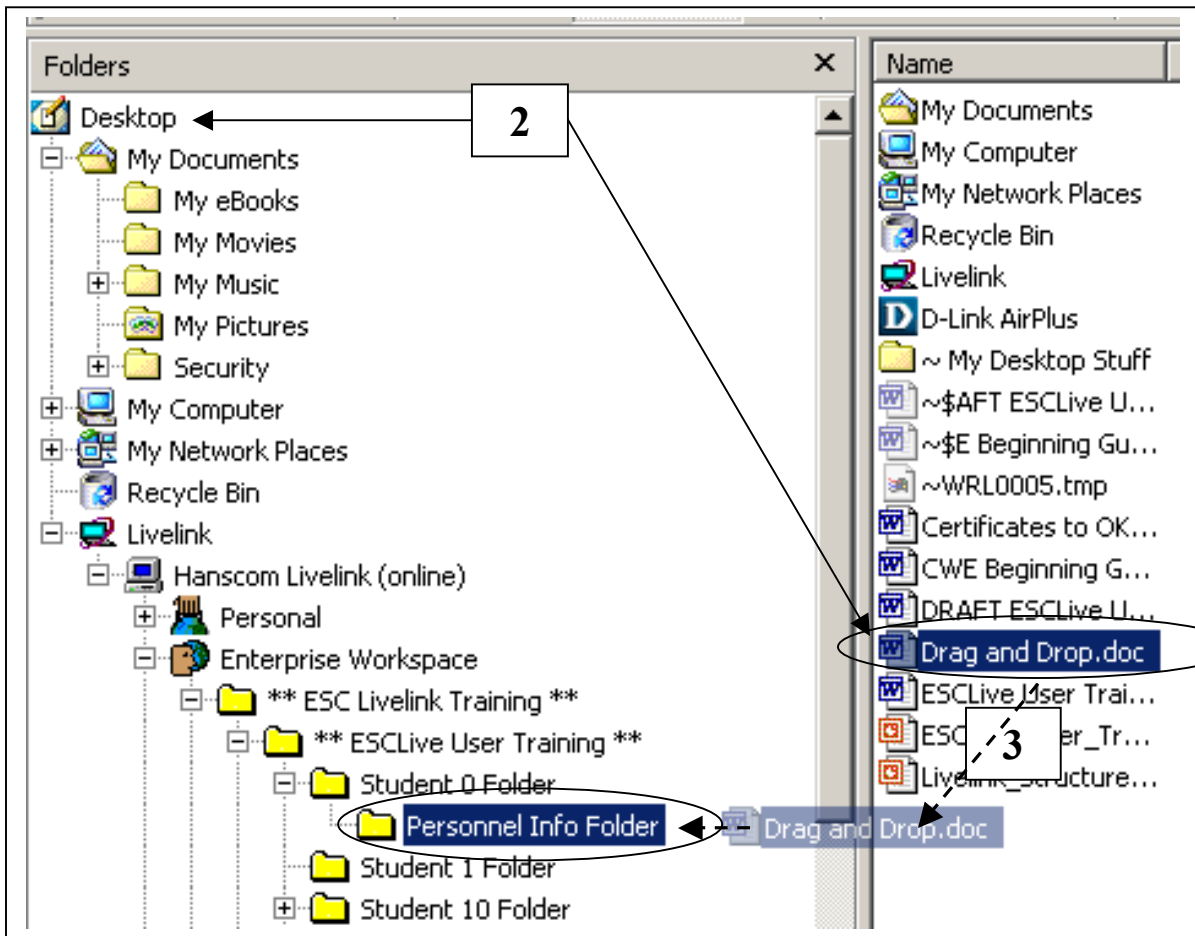
While it is possible to copy large numbers of documents from a shared drive into ESCLive, it is not a good idea to do so. The Best Practice is to only copy a document to ESCLive when the need arises to share or update the item.

There are a number of ways a user can copy documents, via drag-and-drop, into ESCLive. In the following example, a document is copied from your **Desktop** into your **Personnel Info Folder**.

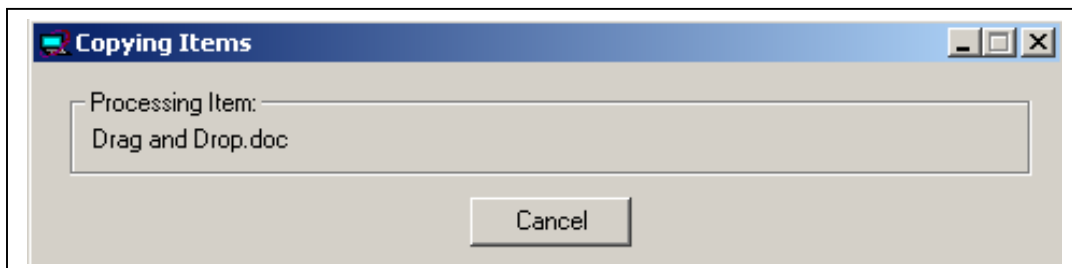
1. On the left side, locate and highlight your **Personnel Info Folder** located in your **Student # Folder**.



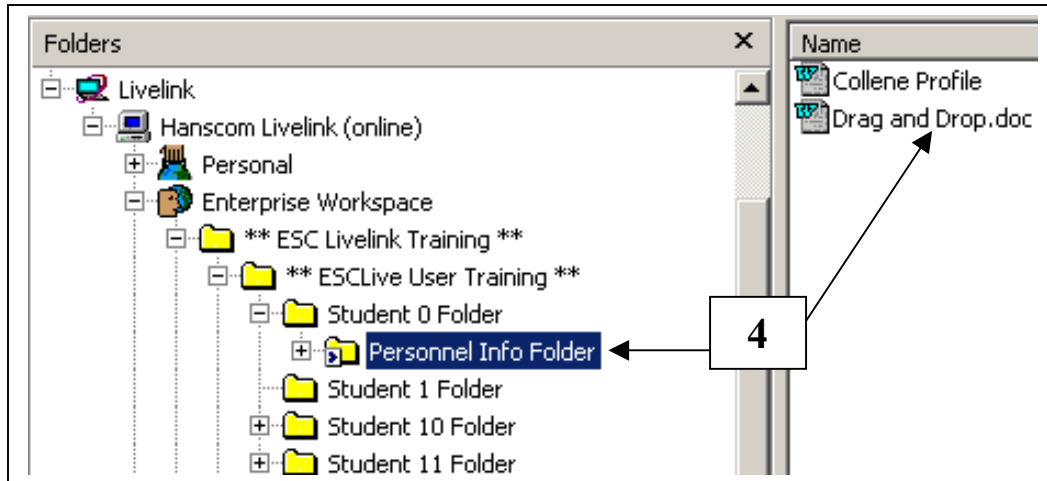
2. Scroll up on the left side and locate, under **Desktop**, the document titled **Drag and Drop.doc**



3. Left click on the **Drag and Drop.doc** document and hold the button down, drag it to the left side until it is superimposed over your **Personnel Info Folder** (folder will be highlighted), and let go. The following message will appear as the document is being copied:



4. If you left click on your **Personnel Info Folder**, you will notice that the document **Drag and Drop.doc** has been copied from the your **Desktop** to your **Personnel Info Folder**.



*** NOTE ***

- When copying a folder into ESCLive, Livelink Explorer will copy all of its subfolders as well, maintaining the same folder structure.
- You can drag-and-drop (copy) individual documents from ESCLive onto your PC's hard drive. However, this does not apply to ESCLive folders or other types of ESCLive objects (e.g., task lists, discussions, voting polls, etc.).
- If you drag-and-drop a document from your shared or hard drive into an ESCLive folder containing a document with the **same name**, it will automatically create a **new version** of that document in ESCLive.
- You can only copy items between your PC's hard drive and ESCLive. However, you may move objects within ESCLive using the same drag-and-drop method.



***** CAUTION: DANGER AHEAD *****

The drag-and-drop feature provides users with the ability to copy entire folders into ESCLive, sometimes referred to as “**bulk**” copying.

Bulk copying of entire folders has the following associated **RISKS**:

- Copying large amounts of files that should not be placed in ESCLive
- Negative impact on performance during normal business hours
- Copying large amounts of files into the wrong location of ESCLive
- Makes the user doing the copying the owner of the document; responsible for the content and for ensuring the document is always up to date
- May violate the principle of IDE that states that there is one and only one correct document

Therefore:

- Copy folders only under the **supervision** of a trained KM or OKM

END EXERCISE 4

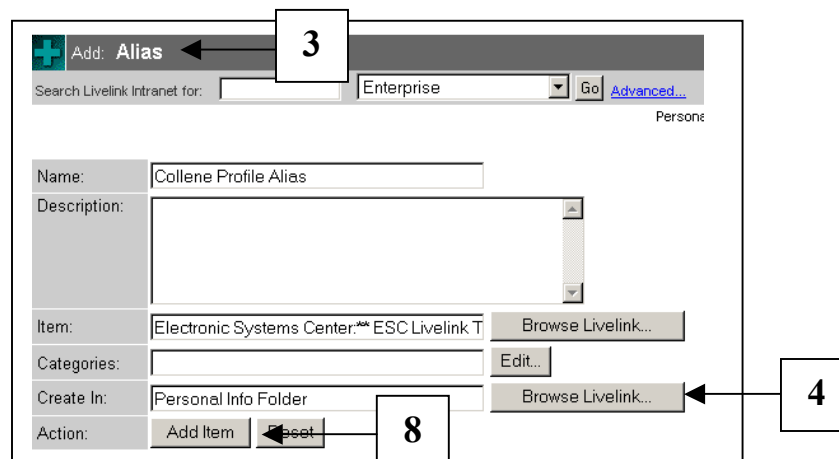
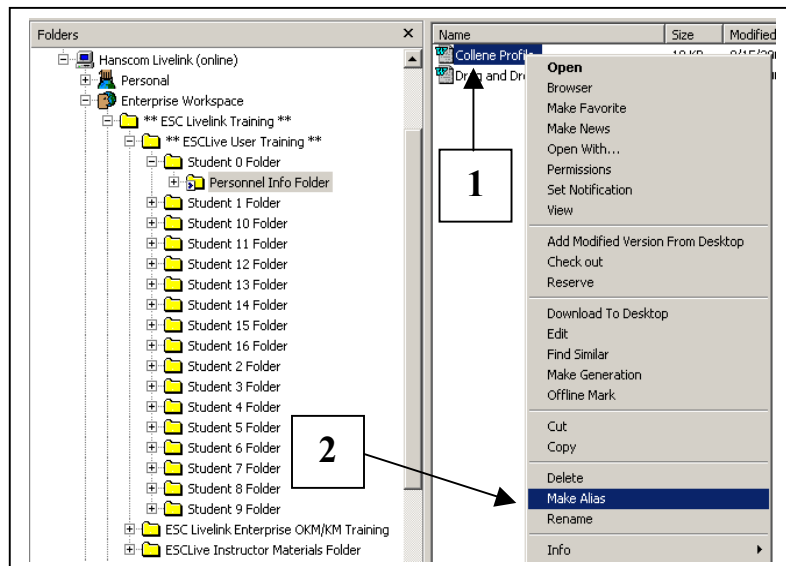
EXERCISE 5: MAKING AN ALIAS



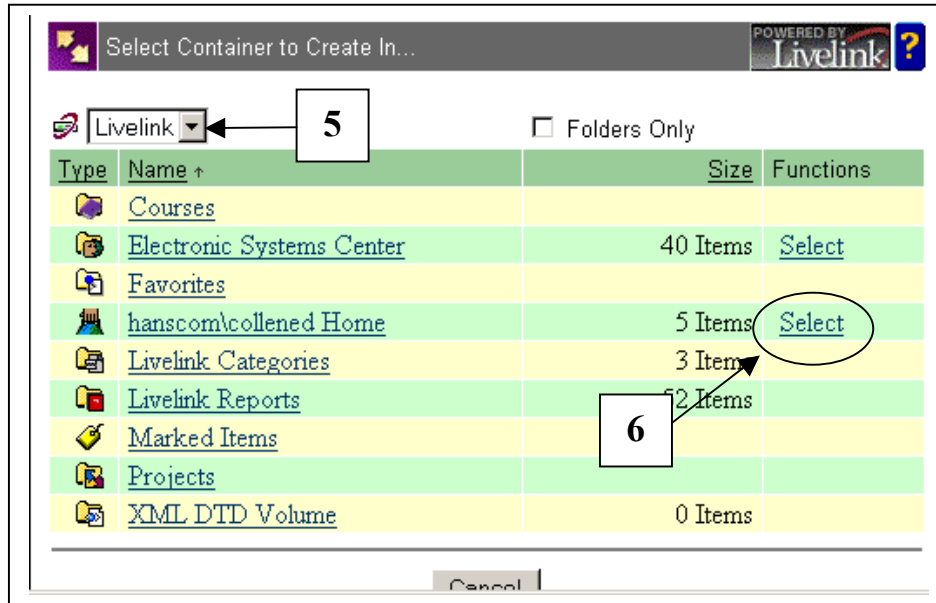
Like a Favorite, an alias is a “shortcut” or link to another object (documents, containers, task lists, etc.) in ESCLive. You can place an alias in any folder or project workspace (to which you have Add Item permission) and use that alias for easy navigation and for cross-referencing. Unlike a Favorite, deleting an Alias does not delete the original object as well as the Alias.

Exercise Overview: In this exercise, you will create an alias to a document and place the alias in your **Personal** workspace.

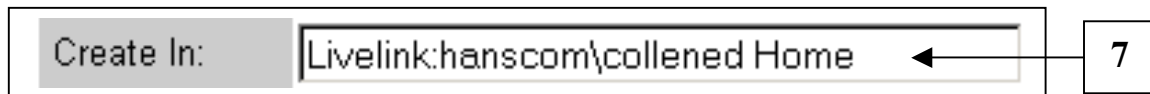
1. Navigate to and right click on your **Lastname Profile** document.
2. Select **Make Alias**.
3. The **Add: Alias** page will open in Web view.
4. Next to the **Create In** field, click the **Browse Livelink** button.



5. A second window opens in the Web view. The word **Liveliink** should appear in the navigation bar.



6. Click the **Select** link for your Personal workspace. (*Hanscom\Lastname and the word "Home" indicate your Personal workspace.*)
7. You are returned to the **Add: Alias** page. Note that the **Create In:** field indicates the alias will be placed in your **Personal** workspace.



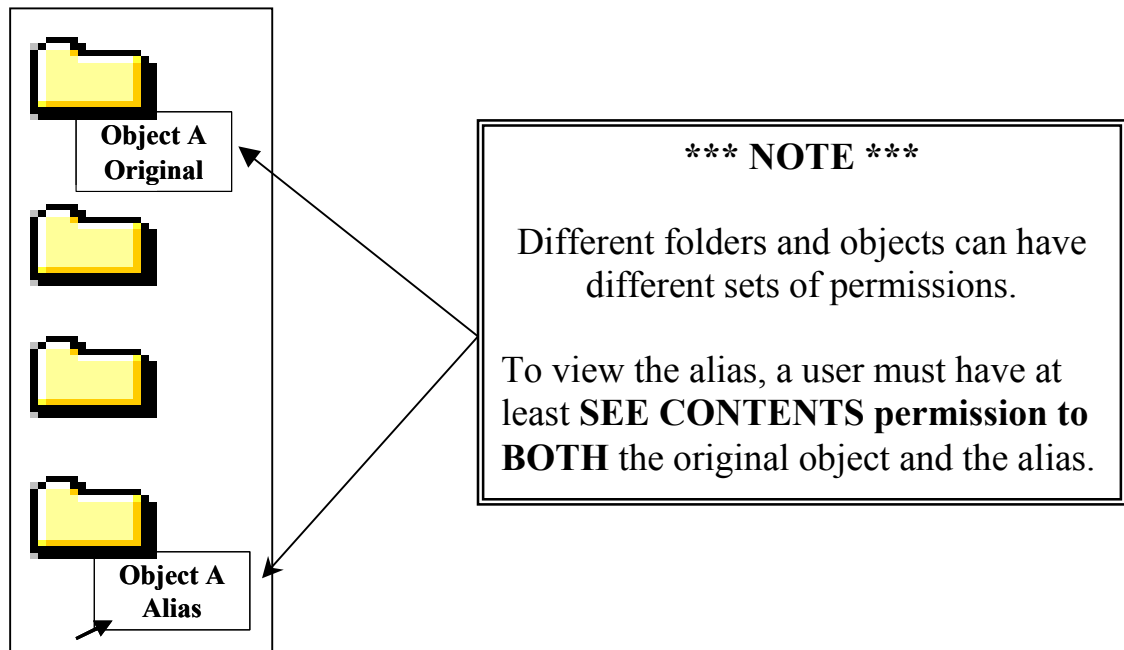
8. Press the **Add Item** button.
9. Navigate to your **Personal** workspace (**Personal** menu > **Workspace**) and double-click on the **Lastname Profile Alias**. Your **Lastname Profile** document, located in your **Personnel Info Folder**, should open.
10. Close the document (X).
11. Use your **Favorites** to go back to your **Student # Folder**.

***** REMINDER *****

You can make an alias to any object.

To insure there is always one, and only one, correct document, use Alias, not copy, whenever possible.

Permissions for an Alias



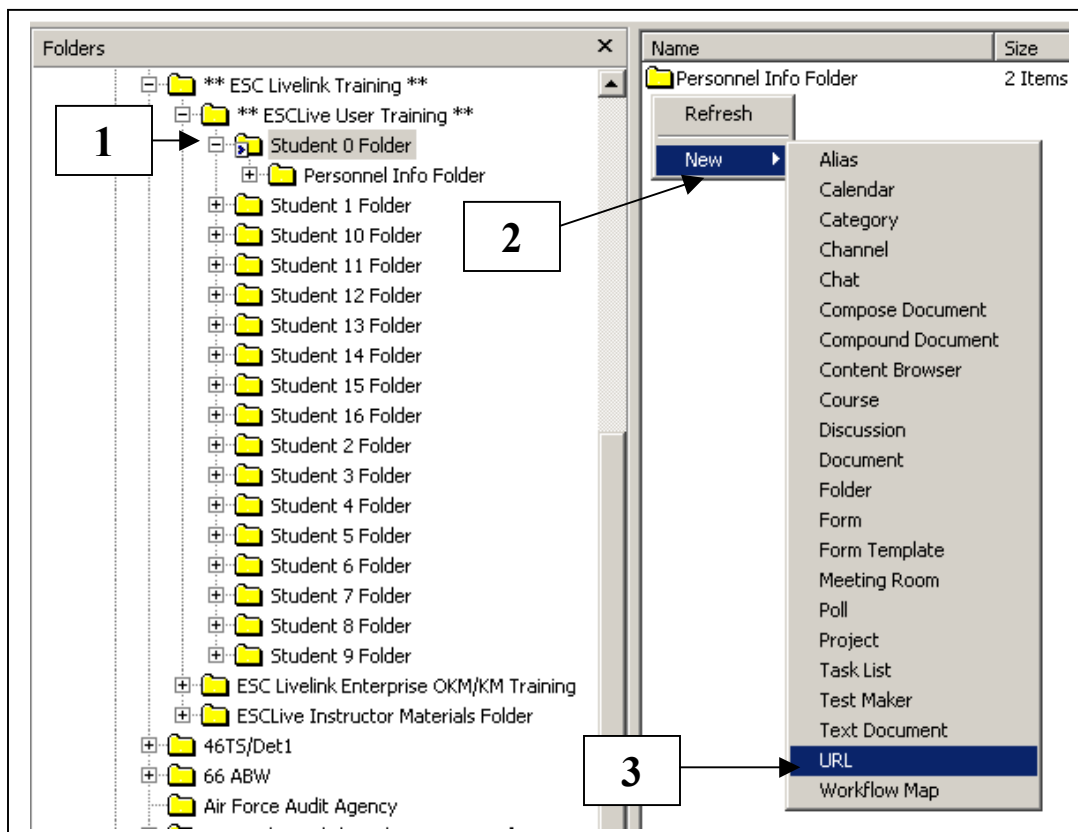
END EXERCISE 5

EXERCISE 6: ADDING A URL

Purpose of Add URL: Adding URLs to your workspace creates links to external web sites. This provides easy reference, grouping and sharing of external web sites within ESCLive. It also saves you from having to open a separate browser while using ESCLive.

Exercise Overview: In this exercise you will add a URL to your **Student # Folder** and then view the Web page.

1. Click on your **Student # Folder**. Note the folder is highlighted and includes an arrow to indicate it is currently selected.
2. Move your cursor to somewhere on the right screen (other than on an object) and right click. When a small menu appears, select **New** from the menu.
3. From the New menu, select **URL**.



4. The Add: URL description page appears in Web view.

+

Add: URL

Search Livelink Intranet for: Enterprise [Advanced...](#)

Person

Name: HQ AF IDE 5

Description:

URL: https://ide.hq.af.mil 6

Categories:

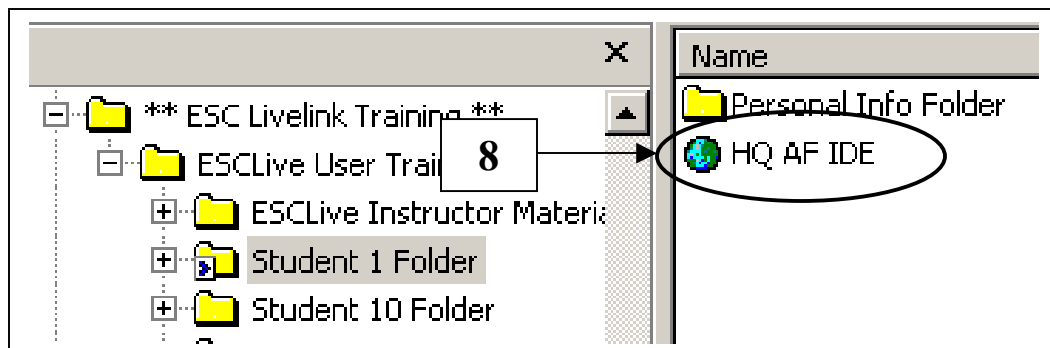
Create In: Student 1 Folder

7

5. In the **Name** field, enter **HQ AF IDE**.
6. In the **URL** field, highlight the field and enter:

https://ide.hq.af.mil

7. Press the **Add Item** button. You are now returned to your **Student # Folder**. Note that you now have the **HQ AF IDE** URL in your folder.



8. Double-click on the URL. This will open a new window and access the Integrated Digital Environment site.
9. When done viewing the IDE site, close the Window (X).

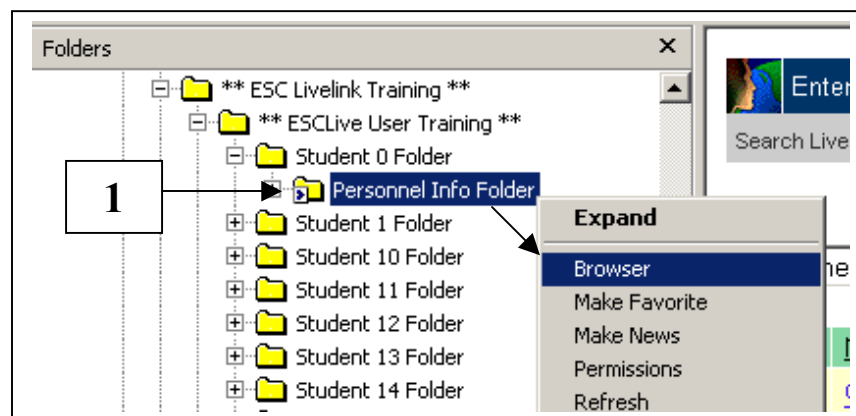
END EXERCISE 6

EXERCISE 7: LINKS TO ESCLIVE OBJECTS

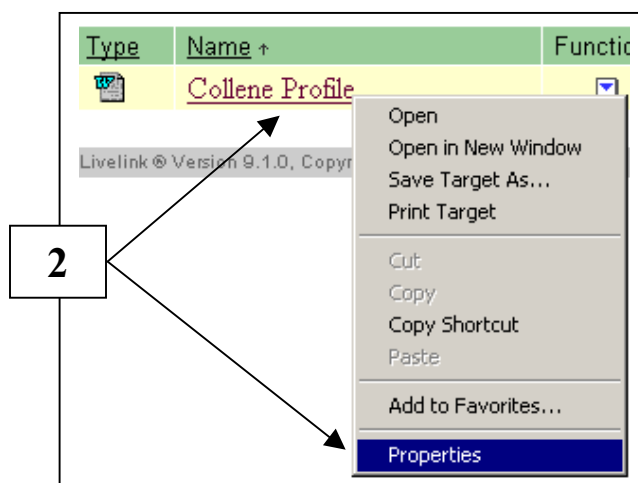
One of the major benefits of using ESCLive is there is no longer a need to attach a document to an e-mail. The user simply inserts a link (URL) to the appropriate document or object in ESCLive, thus cutting down on bandwidth. Additionally, an ESCLive user can insert a link (URL) into a document, such as Word or PowerPoint that, when clicked while on line, will take the reader to the appropriate document or object in ESCLive.

Exercise Overview: In this exercise, you will learn how to insert a link to your **Lastname Profile** document contained in ESCLive into another document or e-mail.

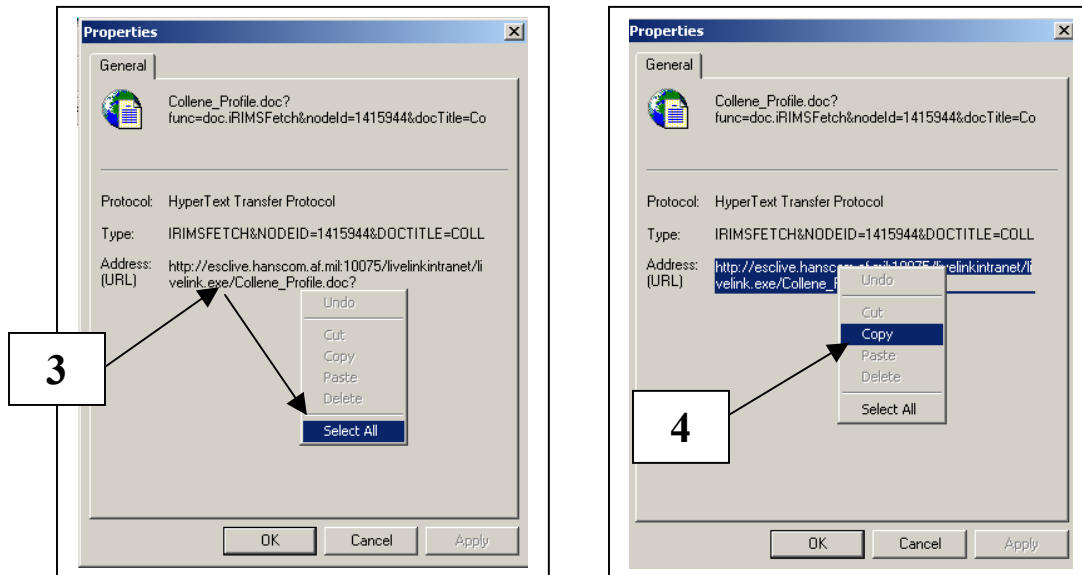
1. First, you must open the ESCLive object in Web view. To do that, highlight the folder or container that contains the document and open the object in Web view. For this exercise, right click on your **Personnel Info Folder** and select **Browser**.



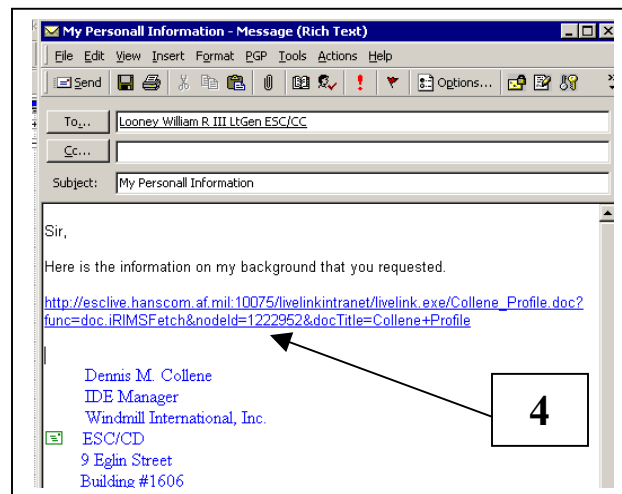
2. Your **Personnel Info Folder** will open up in Web view on the right side. Right click on your **Lastname Profile** document and select **Properties**.



3. The Properties box will open. On most addresses in ESCLive, the URL that is visible is not the complete URL. Highlight the entire URL by right clicking the URL and clicking **Select All**.



4. Right click the highlighted URL address field and click on the **Copy** option. The URL can then be pasted into the appropriate e-mail or document.



5. Livelink Explorer Pro requires a new version of Secure Connect in order for URLs to be sent to users outside of the Hanscom-2k Network. Until the issue is resolved, please add an “s” to the URL when sending or pasting into a document.



***** NOTE *****

To copy a container link (e.g., link to a folder) in ESCLive:

- First, you must open the ESCLive container in Web view by highlighting the container and select **Browser**
- Place your mouse pointer in a “white space” area on the right or Web view side, right click and select **Properties** from the list of options
- Remaining steps are as described above

END EXERCISE 7

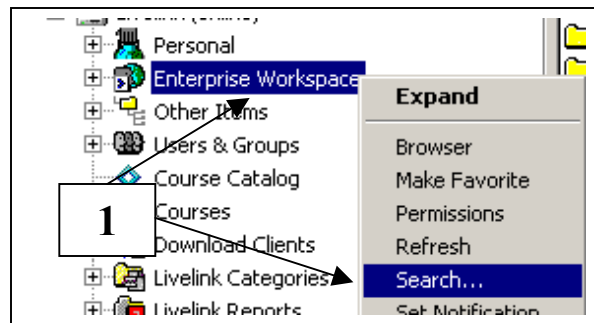
EXERCISE 8: SEARCH (*Not A CLASS EXERCISE*)

Simple Search:

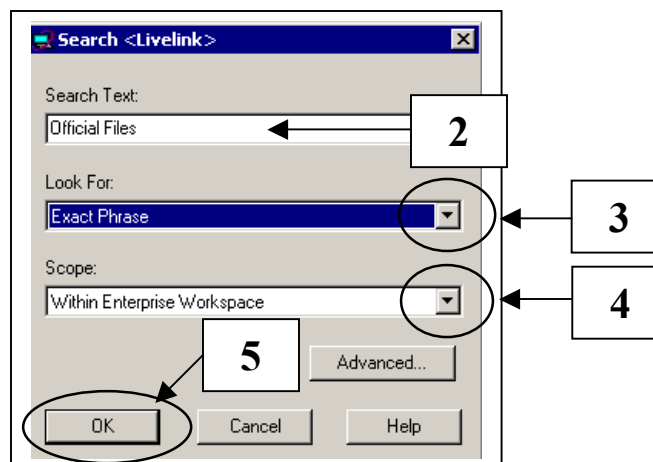
Search all objects (documents, folders, discussions, etc.) meeting keyword criteria. Results are determined by the scope of the search and your permission to the objects.

Exercise Overview: In this exercise, you will perform a simple, keywords search and view a document retrieved from the search.

1. Right click on **Enterprise Workspace** and select **Search**.



2. The search window appears. In the **Search Text** field, enter the phrase **Official Files**.
3. In the **Look For** field, click the down-arrow and change to **Exact Phrase**.
4. In the **Scope** field, click the down-arrow and select **Within Enterprise Workspace**.
5. Click **OK** to begin the search



*** NOTE ***

Scope

An Enterprise search will search the entire CWE, and include Personal Workspaces.

A Within type of search will search within the container you've selected. It does not include Personal Workspaces.

A "Slice" searches just that particular slice of the entire enterprise. It does not include Personal Workspaces.

Results

You'll only get search results on objects that you have at least See/See Contents (Read) permission.

6. A search results page appears in Web view (right side).

6

Search Result

Livelink Intranet

POWERED BY Livelink

Fri, 25 Jul 2003

Personal Enterprise Tools Help

Results: 1 to 10 Refine Query Save Query Save Result Hide Summaries

Themes:

Common Authors:

Author	Rating	Include
Admin	★	<input type="checkbox"/>
Miller, Renee	★	<input type="checkbox"/>
J Gallagher, Sonda	★	<input type="checkbox"/>
Collene, Dennis		<input type="checkbox"/>
Herrera, Denise		<input type="checkbox"/>

Common Dates:

Date	Rating	Include
Past Two Weeks	★	<input type="checkbox"/>
Past Month		<input type="checkbox"/>
Past Three Months	★	<input type="checkbox"/>
Past Year	★	<input type="checkbox"/>

90% [Transportation Plan.doc](#) ☒ Location:

SASM

Date: 07/16/2003 Size: 14 KB

Summary: A new briefing is not required every time you handcarry, as long as it remains in **official files**. A courier letter is required outside of **CHWEB** every time you handcarry on board a commercial a exemption notice is also required and a sample of h be found at x:\esc-in\inp\handcarry. NOTE: All handcarry documents, i.e. sample exemption notices, briefing statements or letters are located on the X drive X:\esc-in\inp\handcarry.

90% [Transportation Plan Basic Handcarrying Classified](#) ☒ Location:

Handcarrying Classified

Date: 07/23/2003 Size: 15 KB

Summary: A new briefing is not required every tim handcarry, as long as it remains in **official files**. An exemption notice is also required and a sample of these can he found at x:\esc-in\inn\handcarry Classified should be

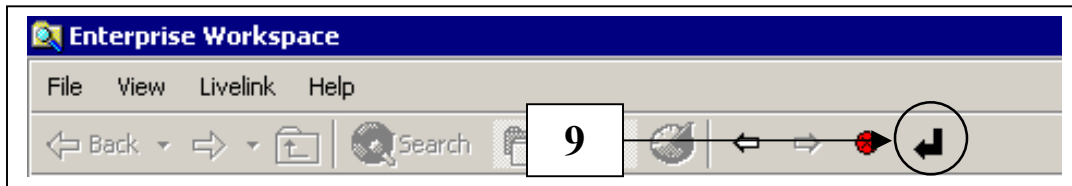
8

7

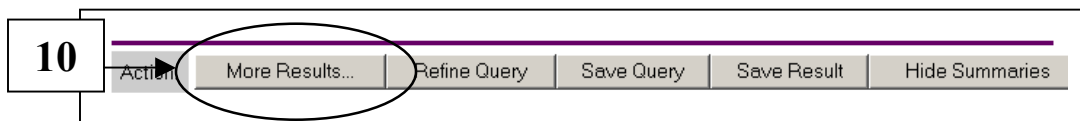
7. The location of the document within ESCLive is displayed to the right of the document name

8. To open any document, simply click on the document name or select **View** from the **Function** menu.

- Close the document (X). If the document opens in Web view, click the Web view **Return** button at the top of the screen to return to the search results page.



- Scroll to the bottom of your results page to see if there are more results. If so, you will see a **More Results. . .** button.

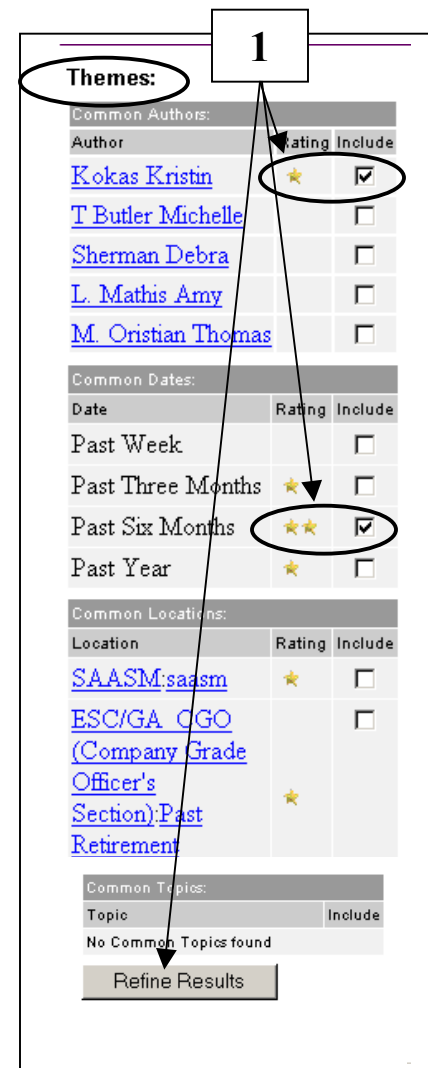


Nested Search

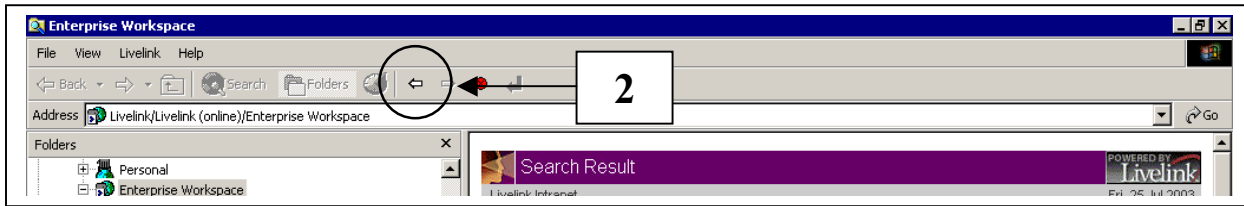
- Themes** provide a way to perform “nested” or refined searches within your current search results. You can refine your search by any or all of the following common themes: authors, dates, topics, and locations.

The Rating indicates how the results share a common theme. For example, an author with a rating of three stars is shared by more search results than an author with a rating of two stars.

Click on the Include column to indicate the Theme criteria you want to include for a refined search and scroll down and press the **Refine Results** button.



2. To return to the enterprise, click the Web view **Back** button enough times until you return to the enterprise page or select another object on the left side.



***** REMINDER *****

Depending on your location in ESCLive and how you want to conduct the search, remember to use either the:

- **Within** option (searches only inside a workspace or slice of the Enterprise pie and does not include your **Personal** workspace.)

-- or the --

- **Enterprise** option (searches entire enterprise, including your **Personal** workspace.)

END EXERCISE 8

EXERCISE 9: NOTIFICATIONS

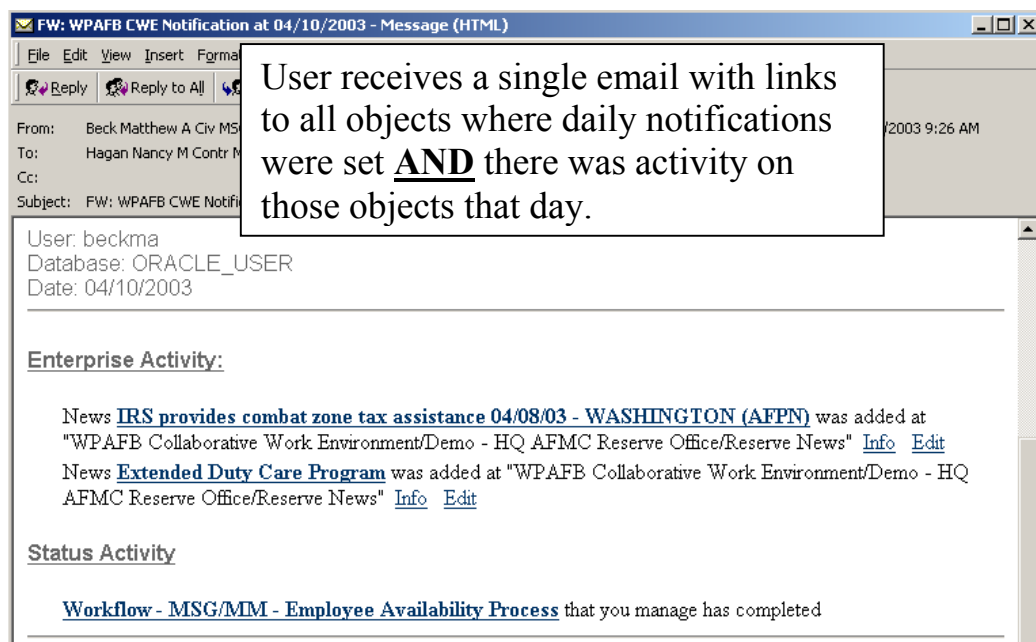
If you desire, ESCLive will automatically send you an e-mail whenever changes occur to certain objects in ESCLive (e.g., new item added to a folder, new version to a document, you receive an assignment, etc.). You may want to have your Knowledge Manager (KM) to help you set up your notification options. Additional information is available in Appendix E.

Exercise Overview: In this exercise you will:

1. Set your e-mail notification in ESCLive which will “tell” ESCLive when and where to send the your e-mails
2. Set the general interest notifications.
3. Set specific interests as needed, based on your requirements.

Two examples of how Notification works:

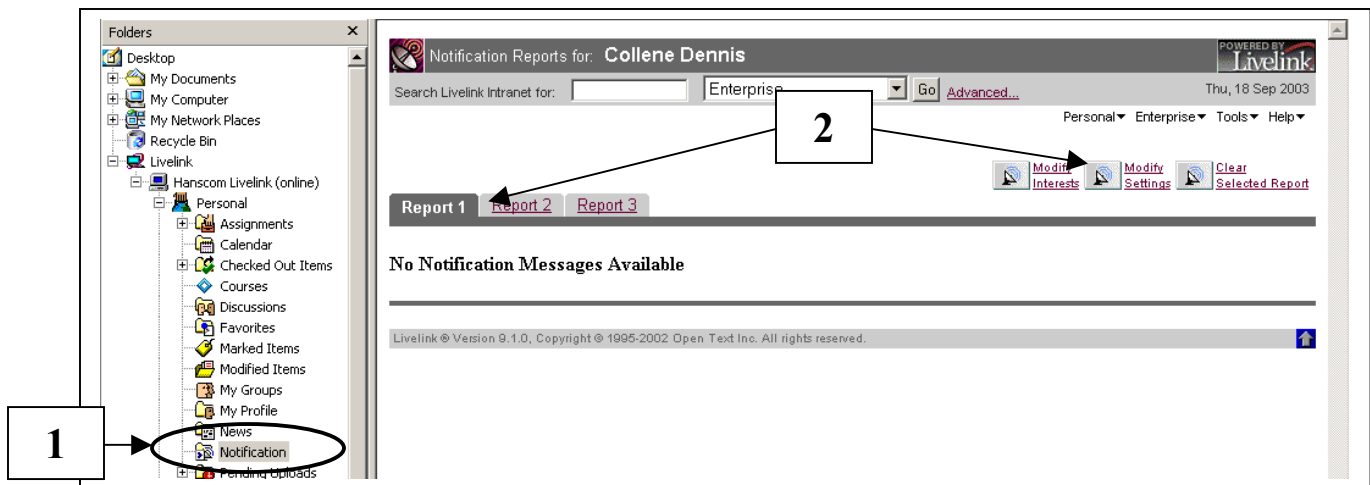
1. When an Urgent (e-mail) Report is set for updates to a document, the user will automatically receive an email within 5 minutes of someone creating a new version. The email is sent only IF a new version is created and is sent only once (**NOT** every 5 minutes).
2. When a Daily (e-mail) Report is set for ESCLive objects, the user will automatically receive a single email for that day with links to all items for which daily notifications were set.



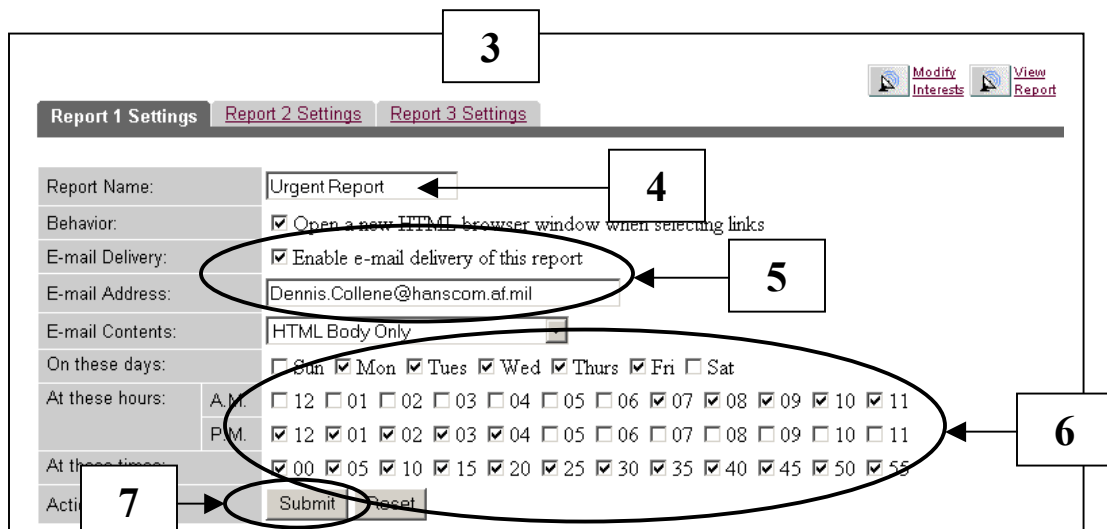
Check Your Settings

You must set up your e-mail notification settings to indicate ESCLive where to send your e-mail notifications. **Options must be set for each of the three types of reports:** Urgent Report (receive an e-mail within approximately 5 minutes), Hourly Report (receive an e-mail within approximately 1 hour), and Daily Report (receive an e-mail once a day).

- 1) From the **Personal** area, click on **Notification**.



- 2) The main notification page appears on the right in web view. Notice there are three tabs; Report 1, Report 2 and Report 3, with the **Report 1 Settings tab already highlighted**. Select the **Modify Settings** button.
- 3) The Report 1 Settings page appears.
- 4) Change the report name to **Urgent Report**.
- 5) If it is not already checked, check the box to **Enable E-mail Delivery of this report**. Make sure your e-mail address appears correctly in the **E-mail Address:** field.

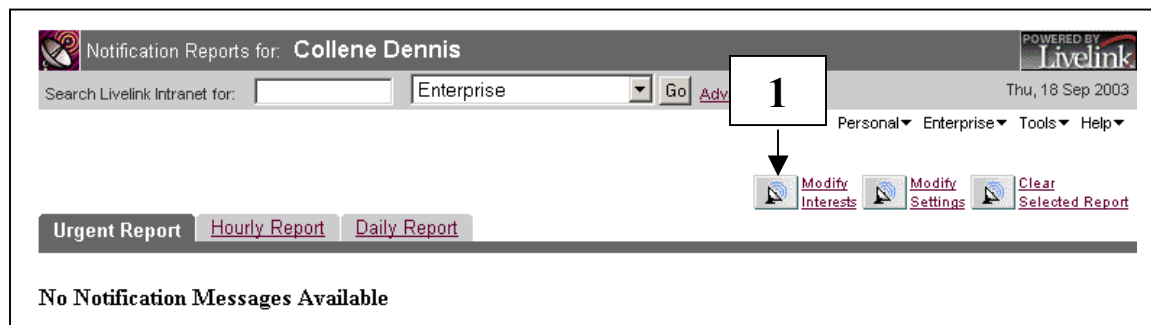


- 6) Set the days and times for ESCLive to check and send you an e-mail report to every five minutes during your normal workday.
- 7) Click the **Submit** button. You're then returned to the main notification page.
- 8) Repeat steps 4 – 7 for the **Report 2 Settings** tab and;
 - a. Change the name of the report to the **Hourly Report**
 - b. Set the days and times for ESCLive to check and send you an e-mail report to once every hour during your normal workday
- 9) Repeat steps 4 – 7 for the **Report 3 Settings** tab and;
 - a. Change the name of the report to the **Daily Report**
 - b. Set the days and times for ESCLive to check and send you an e-mail report to once a day.

Modify Your General Interests

This activity is required to indicate to ESCLive when to send e-mail notifications of General Interest. General Interest refers to activity throughout the entire ESCLive Hanscom enterprise.

- 1) Select the **Modify Interests** button.



The general interest page appears.

- 2) You may want to specify settings for the following interest areas (your discretion):



General Interest	Setting
A Task is assigned to me	Urgent Report
A Task is late	Urgent Report

A Workflow I manage has completed	Hourly Report
A Workflow I manage is late	Urgent Report
A Workflow Step has arrived in my personal Assignments	Urgent Report
A Workflow Step in my personal Assignments is late	Urgent Report
I am added to a Group	Daily Report
I am added to a Project	Daily Report

General Interests: Notify me when...

My Task's settings have changed	<None> ▼
A Task is assigned to me	Urgent Report ▼
A Task is late	Urgent Report ▼
An Item is added	<None> ▼
An Item's status changes	<None> ▼
A Version is added	<None> ▼
A Version's status changes	<None> ▼
A Compound Document Release or Revision is added	<None> ▼
A Topic is added	<None> ▼
A Reply is added	<None> ▼
A News Item is added	<None> ▼
A Workflow I manage has completed	Hourly Report ▼
A Workflow I manage is late	Urgent Report ▼
A Workflow Step has arrived in my personal Assignments	Urgent Report ▼
A Workflow Step in my personal Assignments is late	Urgent Report ▼
I am added to a Group	Daily Report ▼
I am added to a Project	Daily Report ▼

3) Press **Submit**. You will be returned to the main notification page

***** WARNING *****

Setting General Interest notifications in the **Modify Interests** area selects events across the entire Enterprise (all of ESC). For example, if you request to be notified via e-mail any time **A Version is added**, you will be sent by an e-mail every time a new version is added to any document in the enterprise -- **you will be swamped by e-mails!!!** One should use the global notification for specific items such as **A Task is assigned to me**, etc.

Use the **Set Notification** menu to request notification of events for specific (non-global) objects.

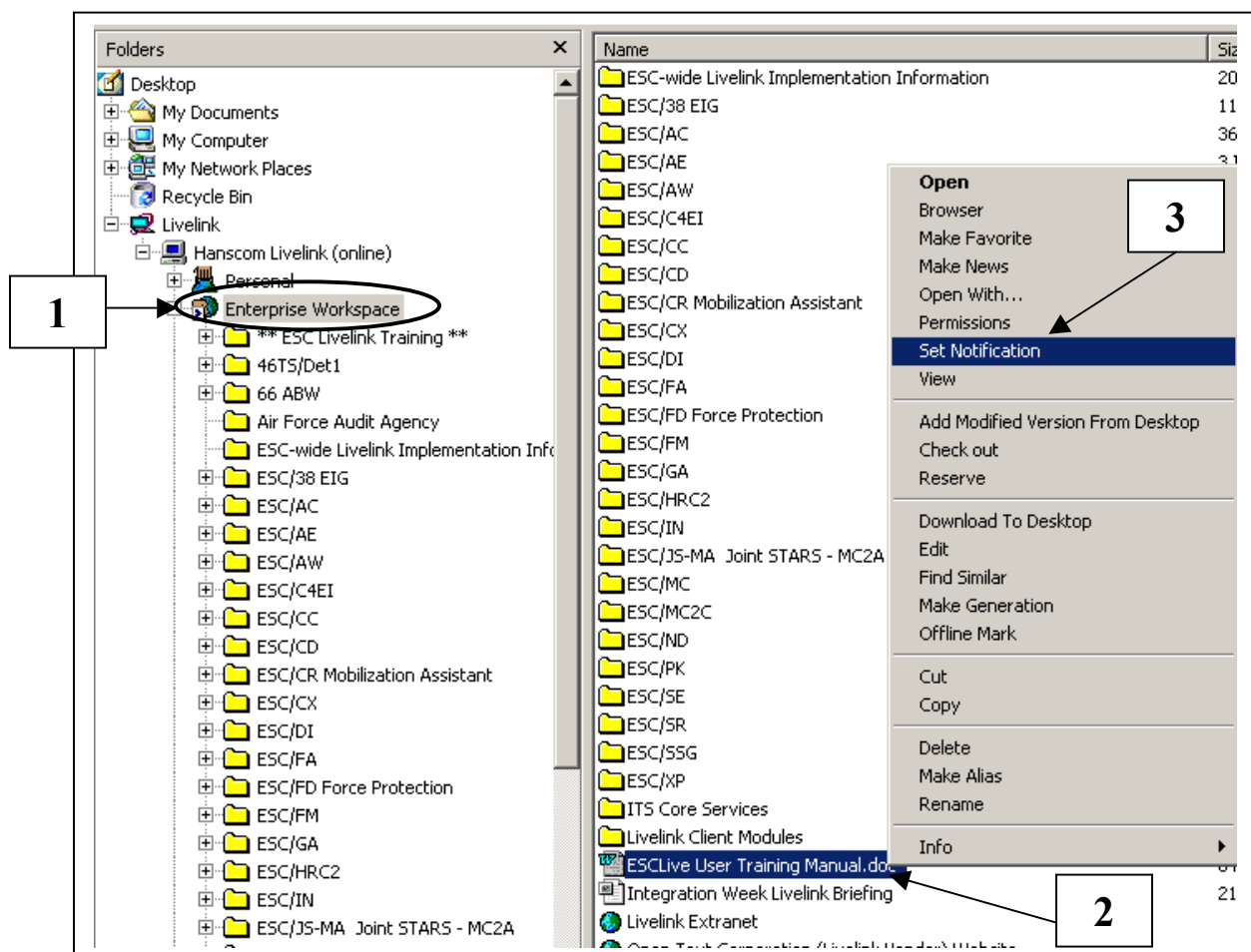
Modify Specific Interests

Requirements for setting Specific Interests will vary for each individual user and each organization. Specific Interests refer to individual items in ESCLive.

Setting Notification for Training Manual Updates

You may want to set up a specific notification so that you will be notified any time the ESCLive User Training Manual is updated. To accomplish:

- 1) Click on the **Enterprise Workspace** folder.
- 2) Right click on **ESCLive User Training Manual.doc**
- 3) Select **Set Notification** menu item.



4) The Set Notification page (for this specific item) appears. Change the **A Version is added** setting from <None> to **Daily Report**

5) Press the **Submit** button.

You will be notified via a daily report e-mail any time the Training Manual is updated.

Set Notification

Search Livelink Intranet for: Enterprise

Item: ESCLive User Training Manual.doc

Notify me when...

An Item's status changes	<None>
A Version is added	Daily Report
A Version's status changes	<None>

Action

4

5

END EXERCISE 9



EXERCISE 10: COURSE EVALUATION AND CLASS CLEAN UP

Exercise Overview: In this exercise, you will fill out a course evaluation utilizing the Livelink **Poll** feature and clean up the training workspace. The **Poll** feature was selected as it is the only object in ESCLive that does not have an **Audit** trail – it is completely anonymous.

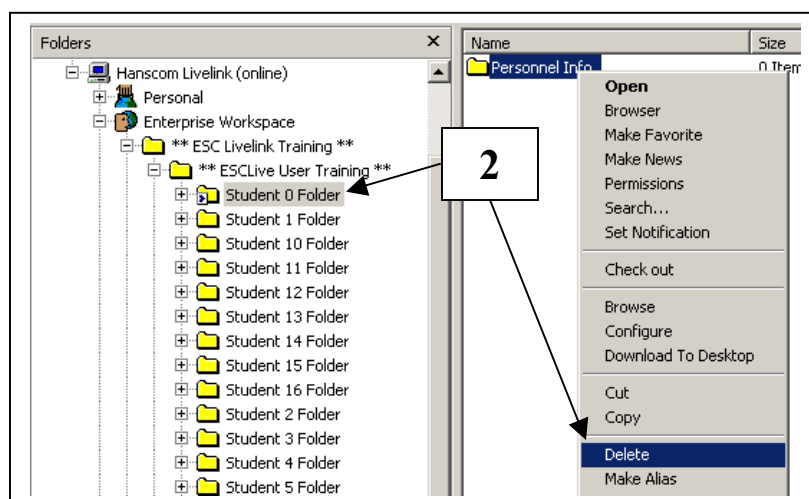
Course Evaluation

Under the **Enterprise Workspace**, navigate to the **** ESC Livelink Training **** folder and double click on the object entitled **ESCLive Course Evaluation Alias**. When the poll opens, please take the course evaluation. While it is possible to select more than one response (radio button) per question, please select only one. Also, since you can access the poll only once, please insure you have answered all questions and made any comments you desire before clicking the Submit button.

Delete Created Objects

When you have finished with the course evaluation, you will delete any objects you created or saved to your **Student # Folder**, and remove any favorites you have made.

1. Navigate to your **Student # Folder** and double click. On the right side, right click your **Personnel Info Folder** and select **Delete**. When you are asked to verify the deletion, press the **OK** button.
2. Repeat for any other items in your **Student # Folder**.



***** NOTE *****

Deleting a container (e.g., folder) will also automatically delete all objects inside the folder (based on having the permission to delete).

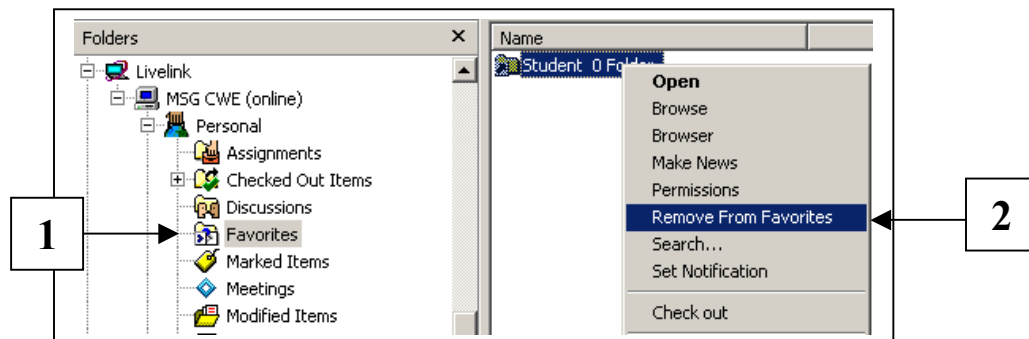
If you get an error message, you probably have a locked version of a document in a folder. To clear the locked version, navigate to the **Function** menu of the document, go to **Info**, then **Versions**, and then **Unlock** any locked versions using the **Function** menu. Try deleting the document or folder again.

If you do not have a locked version then you probably have a reserved document. From the **Function** menu of the document, select the **Unreserve** menu item; or navigate to the **Reserved Item** menu item in your **Personal** workspace and **Unreserve** any reserved documents.

Remove Favorites

The **Remove From Favorites** menu item in ESCLive removes the link to an object; it does not delete the original object from the database.

1. From the **Personal** menu, select **Favorites**.
2. Right click on your **Student # Folder** Favorite and select **Remove From Favorites**.



Shut Down

Close all open applications

- Click the **X** at the top right corner of the Windows Explorer page and close out any other open applications.

Morning Class – Restart your computer

Afternoon Class – Shut down your computer

Training Certificate and Handouts

- Before leaving, please pick up your ESCLive Training Certificate and two handouts that you will find invaluable should you have to use ESCLive via the Web or Browser view.

END EXERCISE 10

APPENDIX A: GETTING HELP



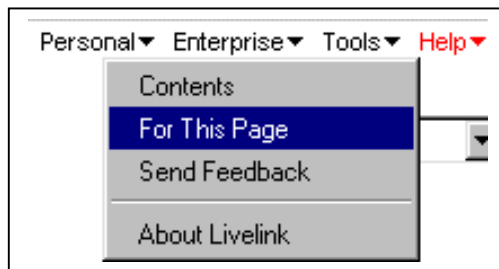
Reference information for ESCLive (Livelink):

ESCLive Training Area:

Guides, Briefings, Demos, Procedures, Sandbox, etc.

Livelink Help:

A great help feature (in the Web view) is located under the Help menu and is called **For This Page**. When selected, it gives specific help for the page you are working. You can also send an e-mail to the Livelink team via the **Send Feedback** Menu (see below).



Reference Information for the Livelink application:

<http://www.opentext.com/products/>

Contacts:

Your OKM/KM

The Livelink Team:

Greg Colbert, ESC/DI-ITI Comm (781) 377-8884
Gregory.Colbert@hanscom.af.mil

Training:

Dennis Collene, ESC/CD Comm (781) 377-6732
Dennis.Collene@hanscom.af.mil

APPENDIX B: INSTRUCTIONS FOR SETTING UP THE LIVELINK EXPLORER PROFESSIONAL CLIENT

If you desire to set up the Livelink Explorer Professional Client on your desktop before the base-wide automatic push-out happens, please click on the following link and follow the directions:

<https://esclive.hanscom.af.mil/livelinkintranet/lisapi.dll?func=ll&objId=682749&objAction=ViewNews&sort=name>

APPENDIX C: ACCESSING ESCLIVE via the WEB VIEW

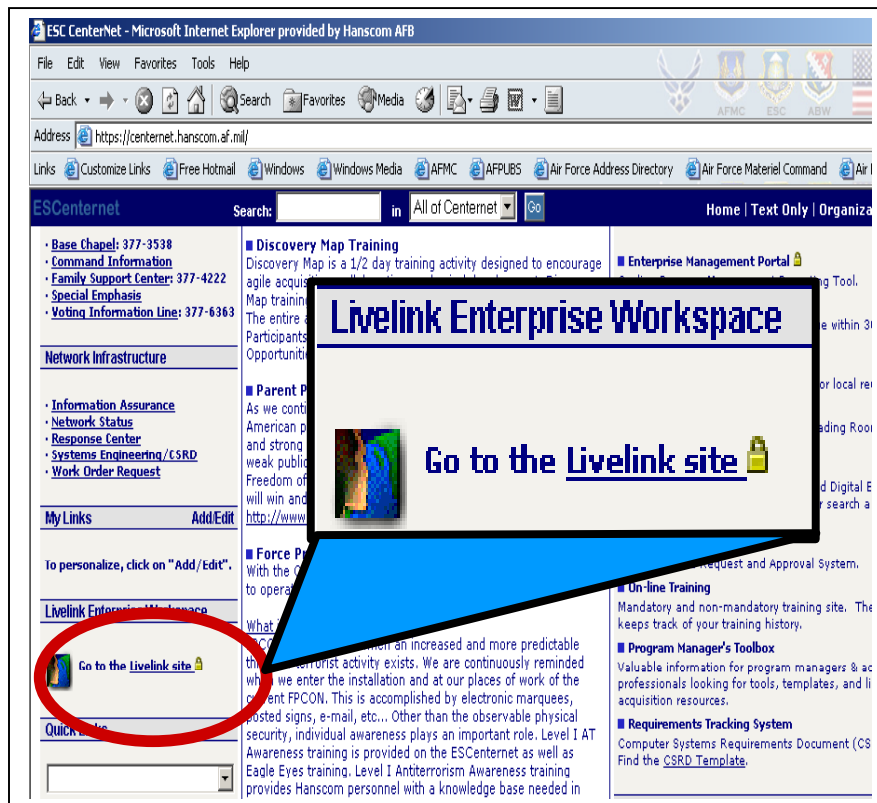
Sign In to ESCLive

Overview: Learn how to log in to the Web view of ESCLive from on or off base, regardless of the type of account.

1. Hanscom.af.mil account holders from work

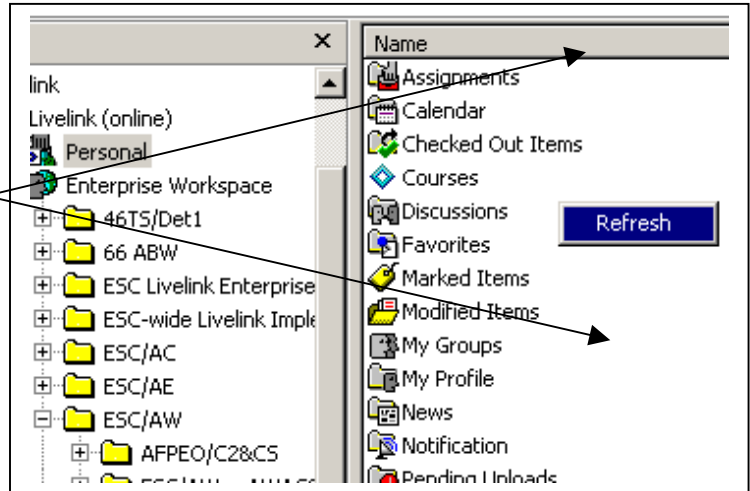
- Log in to the Network as usual
- Open Internet Explorer
- Type in the URL: <https://esclive.hanscom.af.mil>

2. Hanscom.af.mil account holders via ESCenterNet



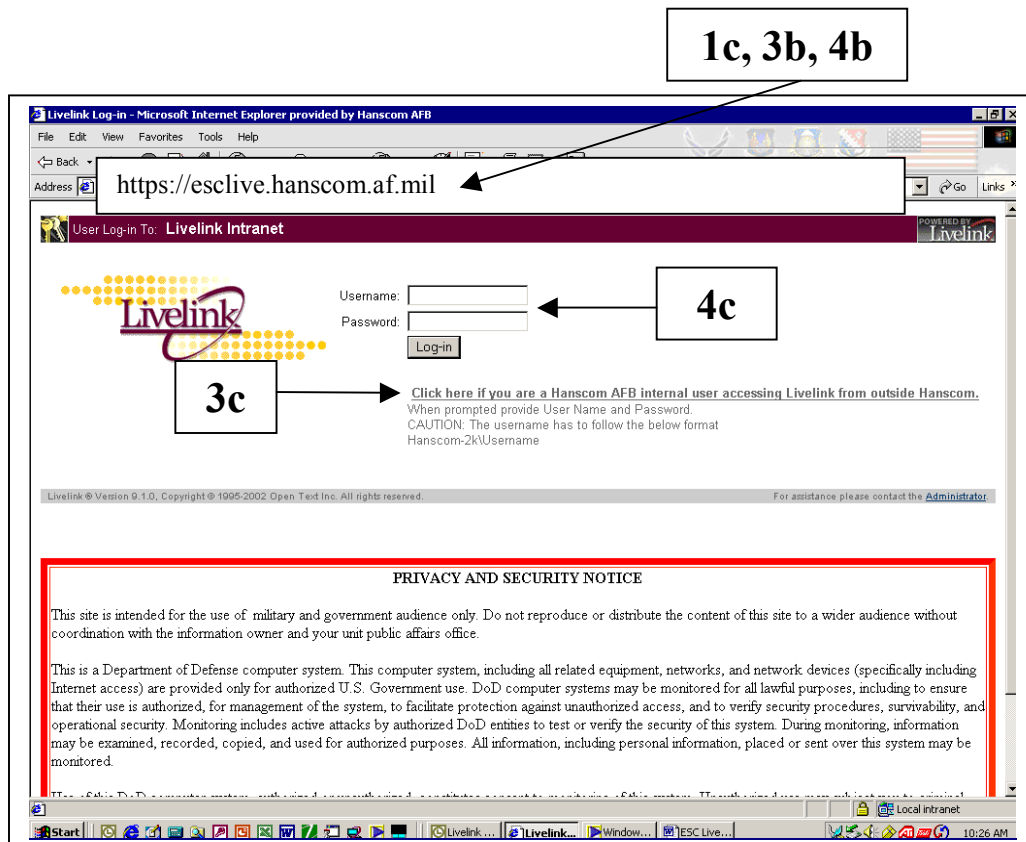
***** NOTE *****

If you have entered ESCLive via the ESCenternet path and you need to refresh, right click somewhere on the right screen (other than on an object) and click on **Refresh**. The normal **Refresh** button at the top of the page would only refresh ESCenternet, not ESCLive.



3. Hanscom.af.mil account holders away from work

- Open Internet Explorer
- Type in the URL: <https://esclive.hanscom.af.mil>
- Click on the underlined text that states; Click here if you are a Hanscom AFB internal user accessing Livelihood from outside Hanscom and follow the instructions for providing your Username and normal Network Password.

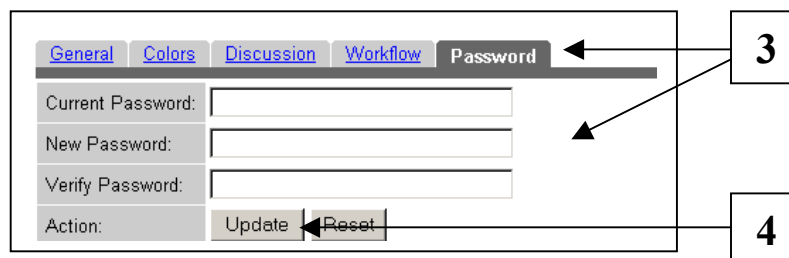
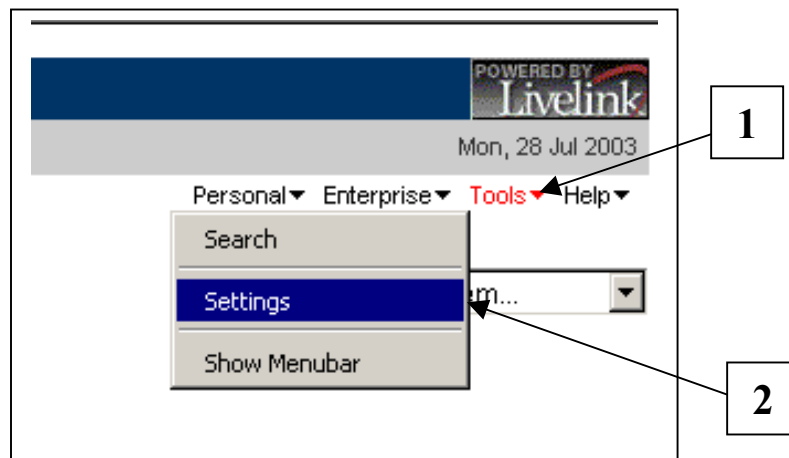


4. Non-Hanscom.af.mil account holders

- a. Open Internet Explorer
- b. Type in the URL: <https://esclive.hanscom.af.mil>
- c. Enter your assigned ESCLive Username and Password

d. Changing Password

Changing password is applicable to External users only. 1) Under the Tools menu, 2) click on Settings and then the 3) Password tab to change your password. Enter Current Password, New Password, and Verify new Password again. Be sure to click 4) Update to affect the change. At this point there are no specific password restrictions in effect.



APPENDIX D: WEB VIEW REFERENCE GUIDE


Livelink Quick Reference Guide

Please contact Sondra.Gallagher@Hanscom.af.mil with questions or suggestions!
781-377-9264 (DSN 478)


External Livelink Logon Instructions/Training

- 1) go to <https://esclave.hanscom.af.mil>
- For **external** users:
 - 2) type in your username (all lowercase)
 - 3) type in your password (case sensitive)
- For **internal** users (when logging in from outside HAFB):
 - 4) click on the link [Click here if you are a Hanscom AFB internal user accessing Livelink from outside Hanscom](#)
 - 5) type in **hanscom-2k\username**
 - 6) type in your network password

Download

	1) Select download from the blue  functions icon drop down list to the right of the documents name
	2) Click save (this will bring up a window to select where you would like to save it to)
	3) Select the location you wish to save it to and click save (you can then open the document from the location you saved it to and make your changes)


Add a Version

	1) Select add version from the blue  functions icon drop down list
	2) Click browse to locate your saved document
	3) Click add version

Add a Document



	1) Select the folder you want to add a document to
	2) Select document from the add new item drop down list in the upper right hand corner of your screen
	3) Name the document (or use the document name as the default)
	4) Click browse to locate your document
	5) Click add item

Reserve

	1) From the blue  functions icon to the right of the document name, select reserve from the drop down list
	2) Click submit

Reserve/Download

	1) Select reserve from the documents blue  functions drop down list
	2) Click download

	3) Click save this file to disk
	4) Select the location you wish to save it to and click save
	5) Click submit
Unreserve	
	1) Select unreserve from the documents blue  functions drop down list
	2) Click submit
Unreserve/Add Version	
	1) Select unreserve from the documents blue  functions drop down list
	2) Click the box add new version
	3) Click browse to locate your document
	4) Click save
	5) Click submit
Add a Folder	
	1) Select add folder from the add new item drop down list
	2) Name the folder
	3) Click submit
Add a URL	
	1) Select add URL from the add new item drop down list
	2) Name the URL
	3) Type in the URL address (or cut and paste)
	4) Click add item
Add an Alias	
	1) Select add alias from the add new item drop down list
	2) Name the alias
	3) Click browse Livelink and locate item
	4) Click select next to the item
	5) Click add item
Creating Favorites	
	1) Select favorites from your personal drop down list
	2) Click add new favorites
	3) Navigate to the item
	4) Click select next to the item
General Notifications	
	1) Select notifications from your personal drop down list
	2) Click modify interests
	3) Choose notifications from the general interests list by using the drop down lists and selecting a report
	4) Click submit
Modify Notification Settings	
	1) Click modify settings
	2) Rename report (can be done for all 3 by clicking on the tab and renaming)

	3) Click the box enable e-mail delivery of this report
	4) Type in e-mail address
	5) Select day and hour of notifications
	6) Click submit
Specific Notifications	
	1) From the item you wish to receive a notification from – select set notification from the blue ▾ functions arrow drop down list
	2) Choose notifications by selecting a report
	3) Select submit
Assignments	
	1) Select assignments from your personal drop down list
	2) Click on an assignment to open
Tasks	
	1) Click on a task to open
	2) Click on attachment name to open
	3) After entering comments or updating the status, click update task
Downloading/Reserving an Alias	
	1) Click on the blue ▾ functions arrow
	2) Select original from the drop down list
	3) Select download/reserve from the blue ▾ functions arrow drop down list
	4) Follow the download/reserve instructions above
Adding a Version/Unreserving an Alias	
	1) Click on the blue ▾ functions arrow
	2) Select original from the drop down list
	3) Select add a version/unreserve from the blue ▾ functions arrow drop down list
	4) Follow the add version/unreserve instruction above
Livelihood Quick Reference Guide Please contact Sondra.Gallagher@Hanscom.af.mil with questions or suggestions! 781-377-9264 (DSN 478)	

APPENDIX E: WEB BROWSER SETTINGS

Configuring Cache Settings

In order to utilize Livelink, you must use a web browser. Both Netscape Navigator/Communicator and Microsoft's Internet Explorer are supported browsers. It is important that you use the correct version of the browser, with the settings outlined below, in order to access documents properly. Although the settings are presented sequentially, it is recommended that you skip through procedure for the particular browser that you are using.

Setting Cache Options with Microsoft Internet Explorer 5.x:

1. Choose *Internet Options* from the *Tools* menu. The Internet Options dialog box opens with a tab for each configuration area.
2. Click the *Settings* button on the *General tab's* page (in the "Temporary Internet Files") area. Settings dialog box displays basic setting information.
3. Click the "Every visit to page" radio button at the top of the window, then click the *OK* button.
4. The dialog box closes. Click *OK* to close the Internet Options dialog box.

Setting Cache Options with Netscape Navigator/Communicator 4.x:

1. Choose *Preferences* from the *Edit* menu. The *Preferences* dialog box opens with a Hierarchical "tree" on the left side listing the various configuration options.
2. Click the + to the left of "Advanced" in the left frame to expand it, then click "Cache". The dialog box displays the cache settings in the right side of the window.
3. Select the "Every Time" radio button under the heading "Document in cache is compared to document on network" and then click *OK* to close the dialog box and save your changes.

Configuring Cookie and Java Settings

Cookies are packets of information exchanged between a browser and various HTTP servers with which it connects. Livelink uses an encrypted cookie to store connection information. Livelink's cookie is thrown away when you exit your web browser or when you log out of Livelink. Therefore, you must set your browser options to accept all cookies.

Setting Cookie and Java Options with Microsoft Internet Explorer 5.x:

1. Choose *Internet Options* from the *Tools* Menu. The *Internet Options* dialog box opens with a series of Tabs. Click the *Security* Tab and then *Custom Level*. Scroll through the list of various security settings and ensure that the radio buttons below the *Allow cookies on your computer* and below *Allow per-session cookies* are set to *Enable*. Click OK.
2. Again choose *Internet Options* from the *Tools* Menu. Click the *Advanced* Tab. Scroll through the list of various configuration settings to the options for *Java VM*. The *Java JIT compiler enabled* checkbox should be selected.
3. Click *OK* at the bottom of the dialog box to accept the changes to the browser settings.

Setting Cookie and Java Options with Netscape Navigator/Communicator 4.x:

1. Choose *Preferences* from the *Edit* menu. The *Preferences* dialog box opens, with a hierarchical list on the left side for the various configuration options.
2. Click “Advanced” in the left frame. The dialog box displays the *advanced* settings in the right side of the window.
3. Ensure that “Enable Java”, “Enable JavaScript”, and “Accept all cookies” are selected, then click the OK button to close the dialog box and save your changes.

Configuring Your PC System to Handle File Transfers

If you or your users are having problems with file transfers of certain file types, you should check the file handling settings. The settings should normal be setup properly. Even if you are a seasoned Internet user, you may not have had much experience with downloading and uploading files over the Internet. Almost every Livelink user spends time adding documents, fetching documents, and checking documents out and in – and these functions are affected by features of your browser and operating system that you may never have used before.

Configuring file handling options using Microsoft Explorer for Windows 95, 98, or NT 4.0:

1. Launch Microsoft Explorer (not Internet Explorer).
2. Choose *Options...* from the *View* menu. Select the *File Types* tab. Scroll through the alphabetically arranged *Registered File Type* list, and highlight

the problematic file type. For example, “Microsoft Word Document”. (If your file type is not listed, skip to step 6).

3. Click the *Edit* button. This opens the *Edit File Type* dialog.

4. Edit the options:

a. The *Enable Quick View*, *Always shows extension*, and *Browse in same window* checkboxes should all be de-selected if files of this type open within Internet Explorer (and you don’t want them to). In most cases, the *Confirm open after download* check box should be the only one that is selected.

b. To change which application launches when you fetch a document of this type, select the *Open* action in the list, then click the *Edit* button to open a dialog box that allows you to select a different application. (Note that this affects your operating system as well as your web browser’s behavior.)

5. Click the *OK* button at the bottom of the dialog box. Click the *OK* button again on the *File Types* Tab.

6. If the file type does not display on the page, you can add settings for a new file type by clicking the *New Type* button and filling in the fields. See your operating system’s help for more information.

Configuring file handling options using Netscape Navigator/Communicator 4.x:

1. Choose Preferences from the Edit menu. A dialog box opens, with a hierarchical list on the left side for various configuration options.

2. Click the + next to the “Navigator” item in the left frame to list its sub-items, then click the “Applications” item. The right side of the window lists the descriptions of all the currently defined MIME types. You can click an item to see its basic information at the bottom of the window.

3. Scan the list of MIME types:

a. If you need to modify the settings for a file type, scan the list on the right for the MIME type you need to change. When you locate it, select it, and then click the *Edit* button to open an “Edit Type” dialog box. You can change the MIME type and the way the file is handled when fetched. Click OK when finished.

b. If you need to create a new MIME type setting, click the *New Type* button in the “Edit Type” dialog box. Enter a description of the type (mimicking the format used for other file type items), the File extension, and the MIME type. Ask your System Administrator if you’re not sure how to populate these fields. In the “Application to Use” field, you can specify the path to the application you want to use to view and edit documents of this type. In the majority of cases, you should also check the “Use this MIME as the outgoing default for this file extension” checkbox.

4. Click the *OK* button in the Preferences dialog box when finished.

Background Information about MIME Types

When you add a document to Livelink, your web browser sends MIME (Multipurpose Internet Mail Extension) type information to be stored with the document. The MIME type defines the type of file, which is similar to the three-character file extension for a Windows document or the embedded creator code for a Macintosh document. When you fetch a document, Livelink sends the MIME type to your web browser along with the actual file. Your web browser uses your computer's MIME type settings to determine the MIME type to send when adding and to determine what to do with the document you fetch. If you are having problems, you should check your file handling settings to verify that:

1. MIME type settings exist for each type of document you use.
2. The setting for each file type specifies the proper action to perform when you fetch. The choices are copy to disk, launch, or "prompt me".

The configuring of file handling options depends on your choice of browser. MS Internet Explorer uses the Windows Explorer file handling options, while Netscape Navigator/Communicator has its own settings. Both browsers include an extensive set of default settings, which you can modify as required.

Configuring your Browser for the Proxy Server

When accessing the Internet from the base, all communications are sent through the base proxy server. While this speeds Internet access by caching common web pages, it may also slow down your connection to the Livelink system. This is due to the fact that during peak periods of Internet use the proxy server becomes slow and since Livelink doesn't need to go through the proxy your browser is unnecessarily slowed down. To configure your browser to avoid the proxy server when connecting to Livelink follow these instructions:

Configuring Internet Explorer 5:

1. Open the browser.
2. Select *Internet Options* from the *Tools* drop down menu.
3. Select the *Connections Tab* and click the *LAN Settings* Button.
4. Do NOT check the box for *Automatically detect settings*.
5. Do NOT check the box for *Use automatic configuration script*.
6. Check the box for *Use a proxy server*.
7. Enter *proxy.hanscom.af.mil* in the *Address* field.
8. Enter *8080* in the *Port* field.
9. Check the box for *Bypass proxy server for local addresses*.

10. Click the *Advanced* button.
11. In the *Exceptions* field add *esclive.hanscom.af.mil*.
12. Click on *OK* to close each of the windows.

Configuring Netscape Communicator/Navigator:

1. Open the browser.
2. Select *Edit* and *Preferences* from the drop down menu.
3. Click on the '+' sign next to *Advanced* and then click on *Proxies*.
4. Click the radio button near 'Manual proxy configuration' and click *View*.
5. For HTTP enter *proxy.hanscom.af.mil* port *8080*.
6. For FTP enter *proxy.hanscom.af.mil* port *8080*.
7. In the *Exceptions* section at the bottom of the dialog box enter 'esclive.hanscom.af.mil' (without the quotation mark). If you already have exceptions listed, separate them with ','s.
8. Click on *OK* to close the *Proxies* dialog box.
9. Click on *OK* to close the *Preferences* dialog box.

APPENDIX F: ESCLive (Livelink) Icons

Icons are used in Livelink to visually identify the wide range of items, tools, and containers available. The following list provides a brief definition of the most frequently used icons:



The blue, drop-down arrow indicates the **Function Icon**, which allows you to access the **Functions** menu on an item and perform actions on it.



The light bulb indicates the **New Item Icon**, which means an item or container is new. By default, this icon remains visible for two days after an item has been added.



The blue, circular, clockwise arrow indicates the **Modified Item Icon**, which means an item, workspace, or container has been modified. By default, this icon remains visible for 7 days after the modification.



The hand holding a remote control indicates the **News Channel Icon**.



The newspaper indicates the **News Story Icon**.



The two faces, nose-to-nose picture indicates the **Discussion Icon**.



The dialogue bubble indicates the **Discussion Topic Icon**.



The dialogue bubble containing an “r” indicates the **Discussion Reply Icon**.



The process flow diagram indicates the **Workflow Map Icon**.



The puzzle indicates the **Project Icon**.



The folder indicates the **Folder Icon**.



The folder with a piece of paper behind it indicates the **Compound Document Icon**.



The notepad indicates the **Task List Icon**.



The dartboard with an arrow indicates the **Task Milestone Icon**.



The folder with a notebook and checkmark indicates the **Task Group Icon**.



The notebook with a checkmark indicates the **Task Icon**.



The globe indicates the **URL Icon**.



An arrow pointing next to another icon like a folder, indicates the **Alias Icon**.



The red or green checkmark next to a document indicates the **Reserved Icon**.



The ruler and slide indicates the **Search Template Icon**.



The voting box indicates the **Poll Icon**.



The blue dialogue bubble indicates the **Description Icon**, which is displayed in a Poll item.



The gray document indicates the **Text Document Icon**.



The letters ABC with a checkmark indicates the new **Spell Check Icon**.



The briefcase indicates an assignment via the **Workflow Step Icon**.



The face indicates the **Select User Icon**, which allows you to search for a specific User or Group.



The stack of encyclopedias indicates the **Live Report Icon**.



The photo negative indicates a **Saved Snapshot Icon**, which allows you to view related, saved search results.



The magnifying glass indicates the **Saved Query Icon**, which allows you to execute related, saved search criteria.



The hand opening a document indicates the **Open From Livelink Icon**, which is available from Livelink Explorer Pro.



The hand resting on top of disks getting a document indicates the **Save to Livelink Icon**, which is available from Livelink Explorer Pro.



The hand resting on top of disks getting a document with a plus sign indicates the **Save As to Livelink Icon**, which is available from Explorer Pro.